LIONBRIDGE

Lionbridge for Relativity

User Guide

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1 Welcome to Lionbridge for Relativity

1 Welcome to Lionbridge for Relativity

Welcome to Lionbridge for Relativity (App). This App enables you to automate sending and retrieving documents from a Relativity workspace and sending them for translation, either to Lionbridge Freeway or to an FTP or SFTP server. This automation dramatically reduces the effort required to create, maintain, and publish documents in multiple languages.

1.1 The Translation Lifecycle

The *translation lifecycle* is the broad process of selecting content, sending it out for translation, and then receiving the translated content back from translation.

This set of steps usually fits inside a larger, more general process called the *content lifecycle*, which is the process of creating, reviewing, editing, approving, and publishing content.

When you consider the translation lifecycle and the content lifecycle together, you have the *global content value chain*, which is the strategy for managing multilingual content.

Remember that localizing content is a subset of steps in the broader content lifecycle. This will improve your focus on key localization considerations, improve processes, and keep all content stakeholders included. Together, this results in better content management.

1.2 Using this Guide

Purpose of this guide

This guide describes how to use Lionbridge for Relativity (App) to manage your translation lifecycle. It describes how to send out documents for translation and receive them back from translation.

Who should use this guide

This guide is intended for content editors, project, marketing, localization or translation managers, or others who are responsible for creating, editing, or approving documents for translation that reside in Relativity.

What your company setup should be

This document assumes that:

- Your company already uses Relativity and has installed the App to a Relativity workspace.
- Your company already has a Lionbridge Freeway account, at https://freeway.lionbridge.com.

What you should already know

This document assumes that:

- You are familiar with the Lionbridge App's configuration for Relativity, and the reasons for choosing certain configuration options. This is important because your company's configuration determines which features are available.
- You have a strong working knowledge of Relativity.
- You are familiar with your company's translation process and requirements.
- You have valid user credentials to log into Relativity.

Note: Not all the features described in this guide may be available. Feature availability depends on both your company's Relativity and Lionbridge App setup and the roles to which you are assigned. If you cannot access functionality that you need, contact your company's Relativity administrator.

How this guide is organized

This guide contains the following chapters:

Chapter	Description
"Welcome to Lionbridge for Relativity" on page 5	A brief description of the Lionbridge solution for Relativity and how it fits into the translation lifecycle. It also includes information about this guide and Lionbridge Connectors Support contact information.
"Getting Started with Lionbridge for Relativity" on page 14	How to get started and an overview of the App interface.
"Planning Your Translations with Submission Sets" on page 16	How to efficiently plan your translations by creating submission sets.
"Submitting Content for Translation" on page 44	How to submit content for translation to Lionbridge Freeway and to SFTP and FTP servers.
"Monitoring Translation Status and Viewing Translation History" on page 77	How to monitor the translation status of documents and submission sets that you submitted for translation.

Chapter	Description
"Post-Translation Tasks" on page 85	How to perform other translation tasks, such as: ■ reviewing translated documents ■ approving translations from Lionbridge Freeway

How to find out more about Lionbridge for Relativity

- For information on installing and configuring Lionbridge for Relativity, read the *Lionbridge for Relativity Installation and Configuration Guide*.
- For information on retrieving documents for translation from the Lionbridge App on an FTP or SFTP server, and returning translated content to the App, read the *Lionbridge for Relativity Translator Guide for FTP/SFTP Users*.

Documentation conventions

This guide uses the following conventions:

Convention	Description
Bold	Highlights screen elements such as buttons, menu items, and fields.
`Courier`	Highlights input, file names, and paths.
Italics	Highlights terms to emphasize, variables, or document titles.

1.3 How to Contact Lionbridge Connector Support

Email @: connectors@lionbridge.com

Telephone: +1-416-363-0888

You can submit a support ticket either:

- by email
- from the Lionbridge Connector Zendesk page, using your web browser

1.3.1 Submitting a Support Ticket

1. Do one of the following:
   - Email connectors@lionbridge.com, and cc (carbon copy) anyone to include in the ticket correspondence.

     Important: Include the information and attachments in your email that are listed in the sub-sections below.
   - Create a ticket in Zendesk:
     a. Open the Lionbridge Connector Zendesk page in your browser: https://connectors.zendesk.com.
     b. Sign in to Zendesk.

        Note: If you do not have sign-in credentials yet, then click either **Sign up** or **Get a password**, and follow the onscreen instructions.

        Important: Include the information and attachments that are listed in the sub-sections below.
     c. Click **Submit a request**.
     d. In the **CCs** field, add anyone to include in the ticket correspondence.

   Zendesk automatically creates a ticket and responds to everyone included in the cc field.
2. Everyone in the original cc receives updates unless they request to be removed from the ticket.

   Important: Check your email spam folder (especially first-time Zendesk users) as sometimes email notifications from Zendesk are marked as spam.

When the issue is resolved, Lionbridge closes the ticket.

1.3.2 Information to Include in a Support Ticket

- client name
- CMS or content system name and version
- Connector or App version installed
- name of job for which the issue occurs
- date of job submission
- detailed description of the issue
- any error text–copy and paste, if applicable

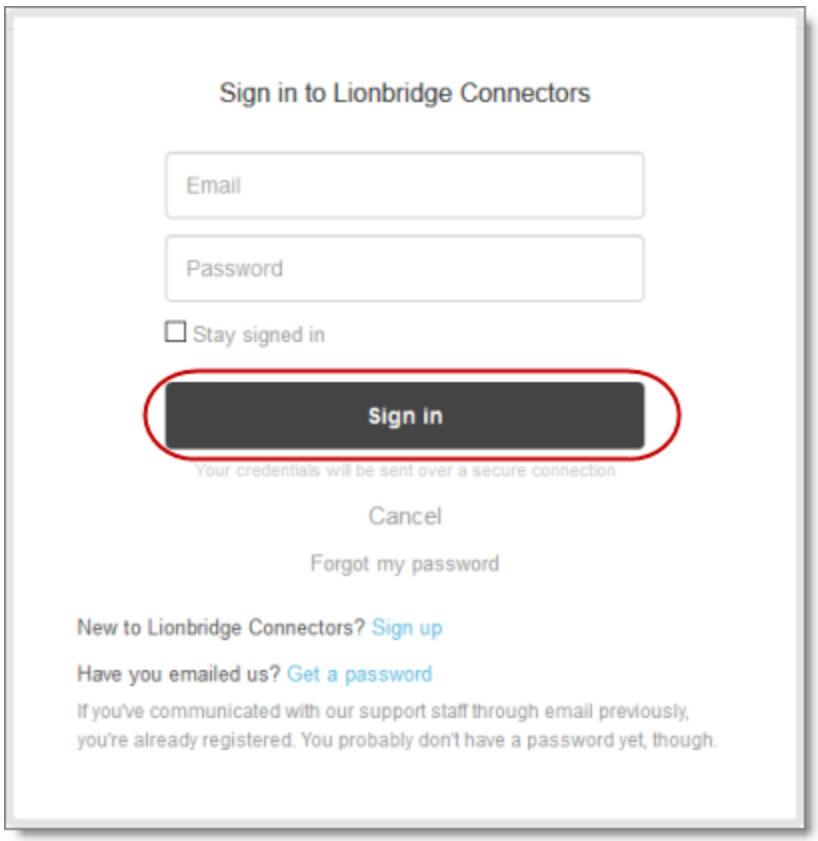
Files to attach to the support ticket:

- CMS log files for the date the issue occurred
- Connector or App log files for the date the issue occurred
- screen capture of the issue

1.3.3 Viewing and Updating Your Support Ticket in Zendesk

Important: You must log into Zendesk to view your support tickets there.

1. Open the Lionbridge Connector Zendesk page in your browser: https://connectors.zendesk.com.
2. Enter your credentials, and click **Sign in**.



Note: If you do not have sign-in credentials yet, then click either **Sign up** or **Get a password**, and follow the onscreen instructions.

3. After signing in, click **My activities** to view the tickets you opened or where you are cc'd.
4. To update tickets, you can reply or attach files.

For more information, refer to "Submitting and tracking support requests" in Zendesk's *Help Center guide for end-users*, at: https://support.zendesk.com/hc/en-us/articles/203664386-Help-Center-guide-for-agents-and-end-users.

Important: Zendesk refers to a *support ticket* as a *support request*. These terms are interchangeable.

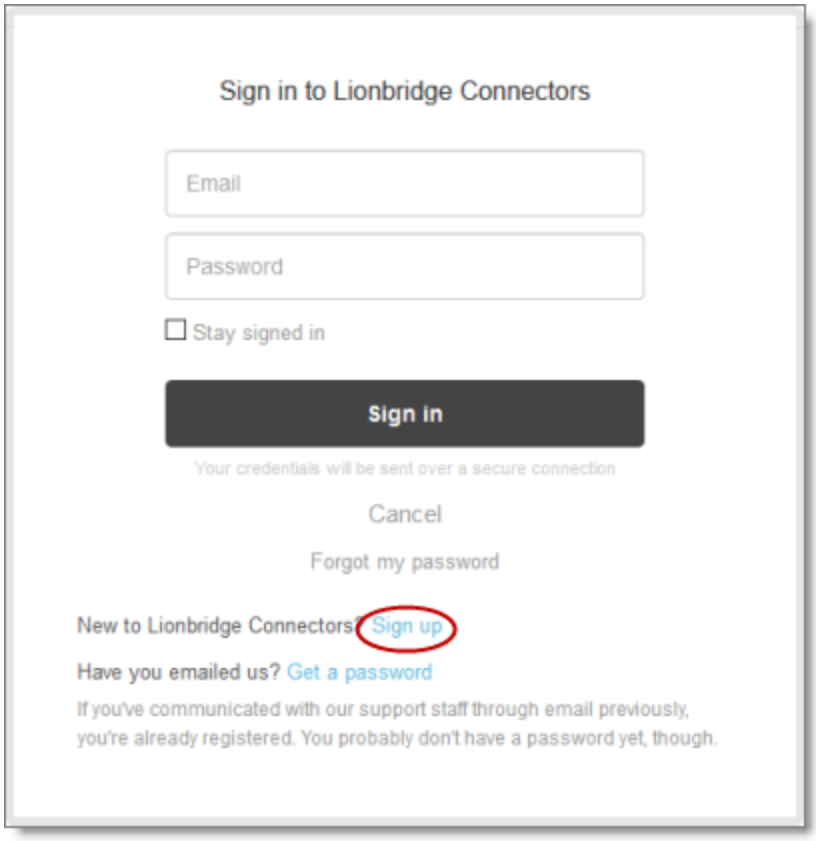
1.3.4 Signing Up for a Zendesk Account for Lionbridge Connectors

You can create a new Zendesk account for Lionbridge Connectors.

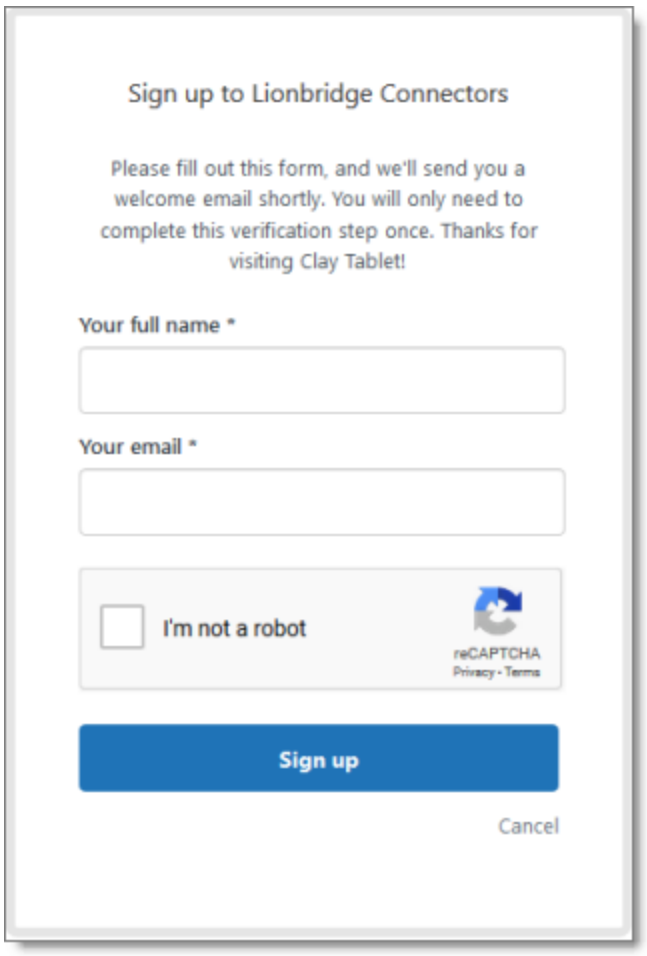
Note: If you have previously emailed Lionbridge Connectors Support at connectors@lionbridge.com to create a support ticket, you can get a password for your email account. For detailed instructions, see "How to Get a Password if You Have Previously Emailed Lionbridge Connectors."

To sign up for a Zendesk account:

1. Open the Lionbridge Connector Zendesk page in your browser: https://connectors.zendesk.com.
2. Click **Sign up** link.



The **Sign up** page opens.



3. Enter your name and email address, and select the **I'm not a robot** check box.
4. Click **Sign up**.

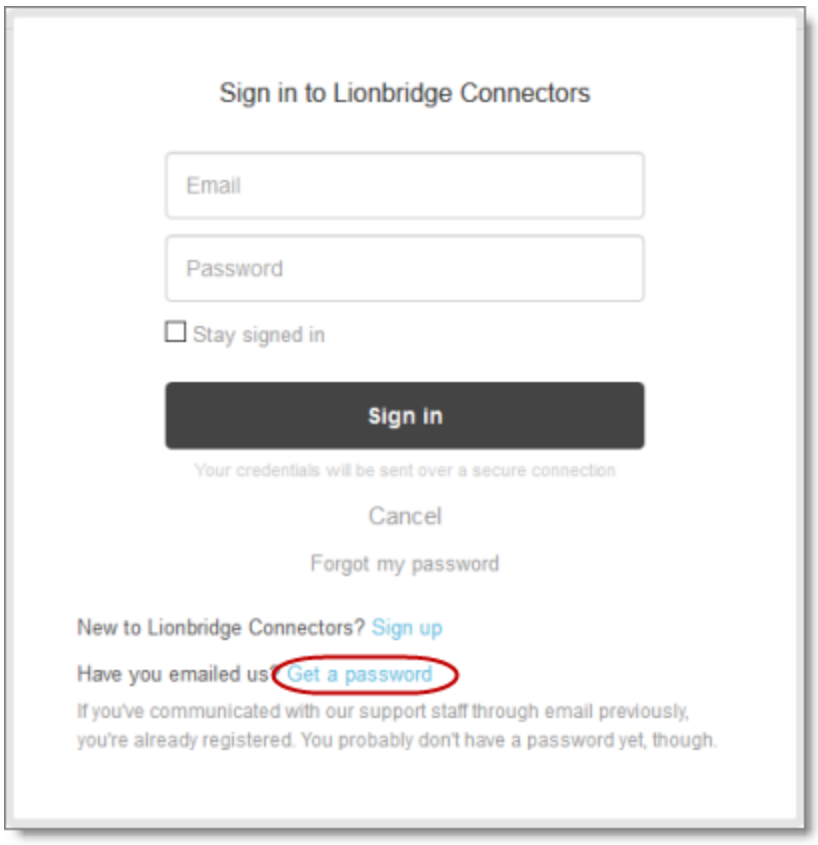
   The **Sign-up complete** page opens. You will receive a verification email shortly with a verification link that enables you to sign in. If you do not receive an email within a few minutes, please check your junk or spam folder.
5. Click the link in the verification email to create a password and sign into Zendesk.

1.3.5 Getting a Zendesk Password if You Previously Emailed Lionbridge Connectors

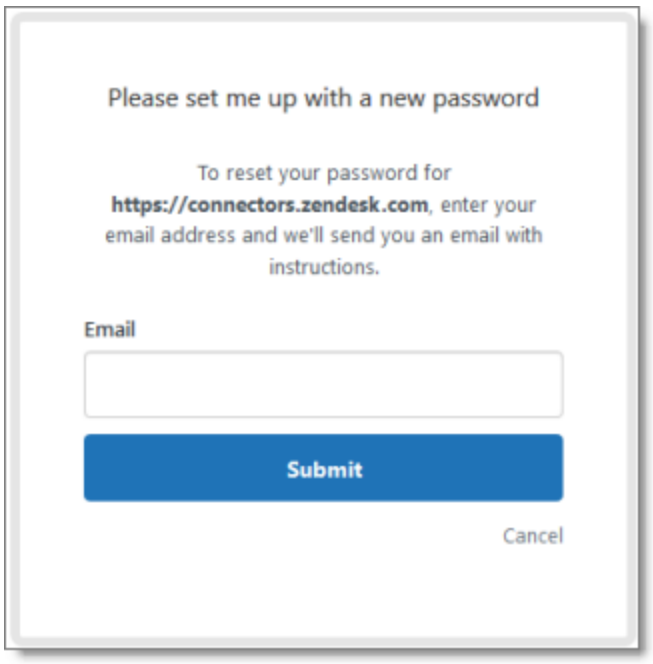
If you have previously emailed Lionbridge Connectors Support at connectors@lionbridge.com to create a support ticket, you can get a password for your email account.

To get a password:

1. Open the Lionbridge Connector Zendesk page in your browser: https://connectors.zendesk.com.
2. Click the **Get a password** link.



The **Please set me up with a new password** page opens.



3. Enter the email address from which you emailed Lionbridge Connectors Support (connectors@lionbridge.com).
4. Click **Submit**.

   Zendesk sends you an email with instructions for creating your password.
5. Follow the instructions in the email from Zendesk to create your password.

You can now sign in to Zendesk to create, view and update your support tickets.

2 Getting Started with Lionbridge for Relativity

2 Getting Started with Lionbridge for Relativity

The App supports all web browsers that Relativity supports.

To access the App:

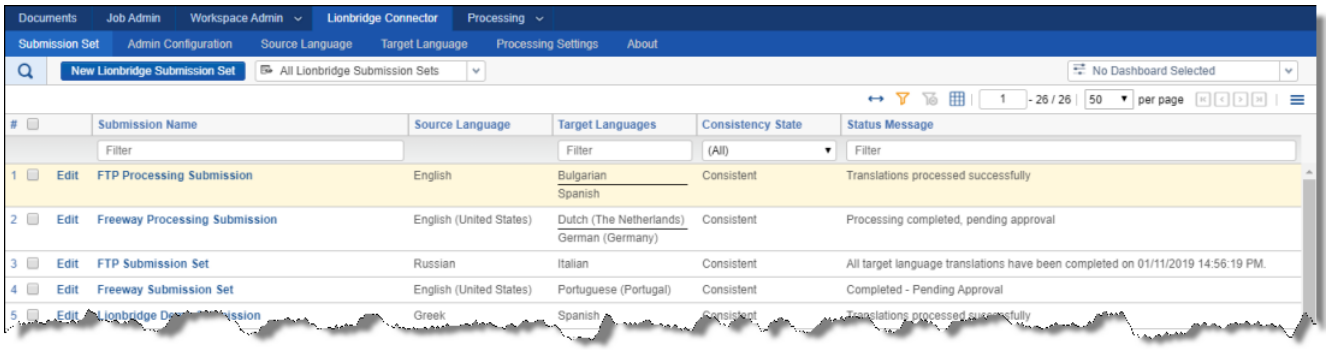
1. Log in to Relativity.
2. Open the workspace where the App is installed.
3. Click the **Lionbridge Connector** tab.

Tip: If the **Lionbridge Connector** tab is not displayed, click the menu button and select **Lionbridge Connector** from the menu that opens.

2.1 The App at a Glance

You access Lionbridge for Relativity ("App") directly from the Relativity workspace to which it is installed.

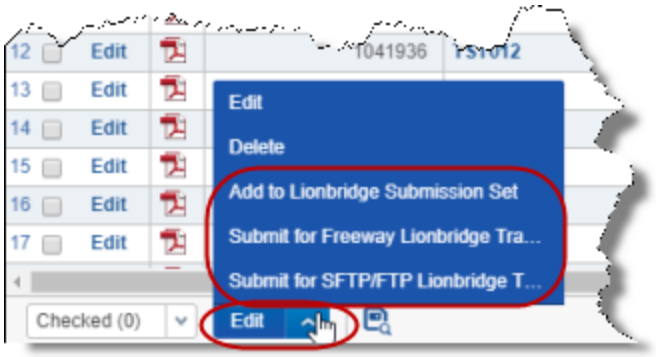
You access App functionality primarily from the **Lionbridge Connector** tab:



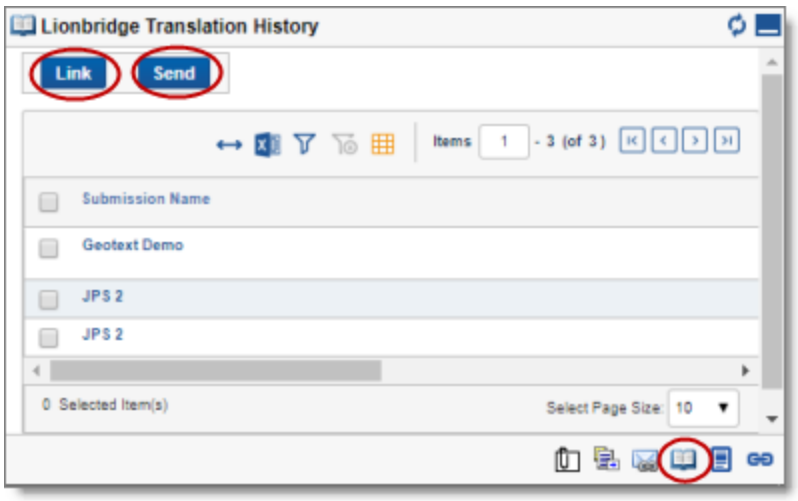
- You use the **Submission Set** tab to group documents to submit for translation and to submit these sets of documents for translation.
- You use the **Admin Configuration**, **Source Language**, **Target Language** tabs to configure the App. For detailed descriptions of these tabs, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

You can also access some App functionality from within the Relativity workspace.

- From the **Edit** menu at the bottom of the **Documents** tab, you can add multiple documents to a submission set or send them out immediately for translation.



- From the **Lionbridge Translation History** icon and pane at the bottom-right corner of the document viewer, you can add a single document to a submission set or send it out immediately for translation.



Tip: An orange bar on the left side of the field indicates a required field.

3 Planning Your Translations with Submission Sets

3 Planning Your Translations with Submission Sets

Every time that you submit documents for translation, you submit them as a *submission set*. The information in the submission set includes the translation parameters, such as source and target languages, and translation-provider configuration. You can create submission sets before you submit documents for translation—this enables you to schedule when to submit these documents for translation. Alternatively, you can send single or multiple documents immediately for translation and specify the translation parameters in the submission set you create at that time.

Creating submission sets in advance enables you to work more efficiently. It has the following advantages:

- You can send large batches of documents for translation from the same source language to the same set of target languages, with the same metadata.
- You can create a submission set before all documents are ready for translation.
- You can schedule the submission of the documents within the set for a specific day, or the end of the week. As documents that you want to send together become available in the system, you can add them to that submission set.

Consider the following guidelines when planning your submission sets:

- The maximum number of documents in the set is 2000.
- The file size of each document must be less than 200 MB.
- Documents must be in the same source language.
- Documents must be sent for translation into the same set of target languages.
- Do not include documents with the same source-target language pairs in multiple submission sets.

  For example, if a document is in submission set "A" for translation from English to French, do not include it in submission set "B" for translation from English to French. However, you can include the document in submission set "C" for translation from English to German.

This section contains the following subsections:

- "Creating a Submission Set" on page 17
- "Editing a Submission Set" on page 29
- "Adding One Document to a Submission Set" on page 39
- "Adding Multiple Documents to a Submission Set" on page 41

For instructions on submitting documents for translation immediately without creating a submission set first, see:

- "Immediately Submitting One Document for Translation" on page 48
- "Immediately Submitting Multiple Documents to Freeway for Translation" on page 58

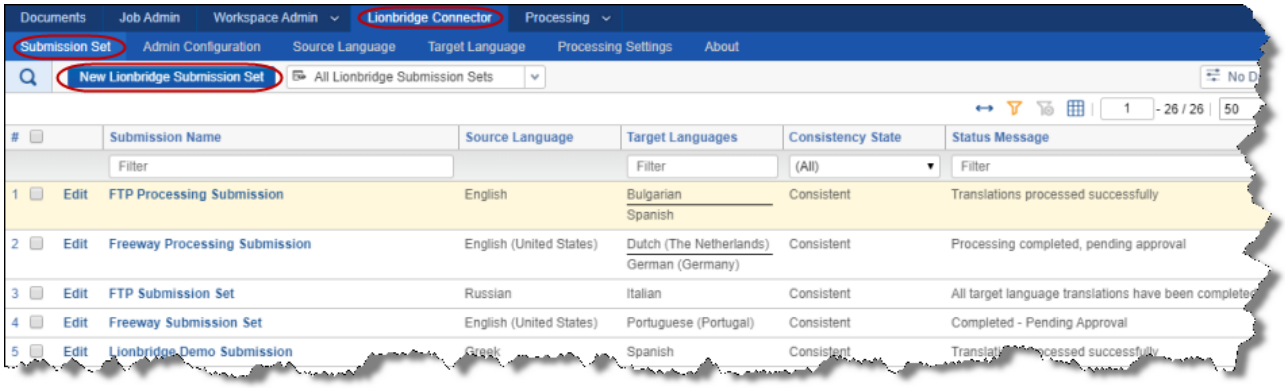
- "Immediately Submitting Multiple Documents to an FTP or SFTP Server for Translation" on page 66

3.1 Creating a Submission Set

You create a submission set so that you can send multiple documents for translation from the same source language into the same set of target languages with common metadata. For more information about submission sets, see "Planning Your Translations with Submission Sets" on page 16.

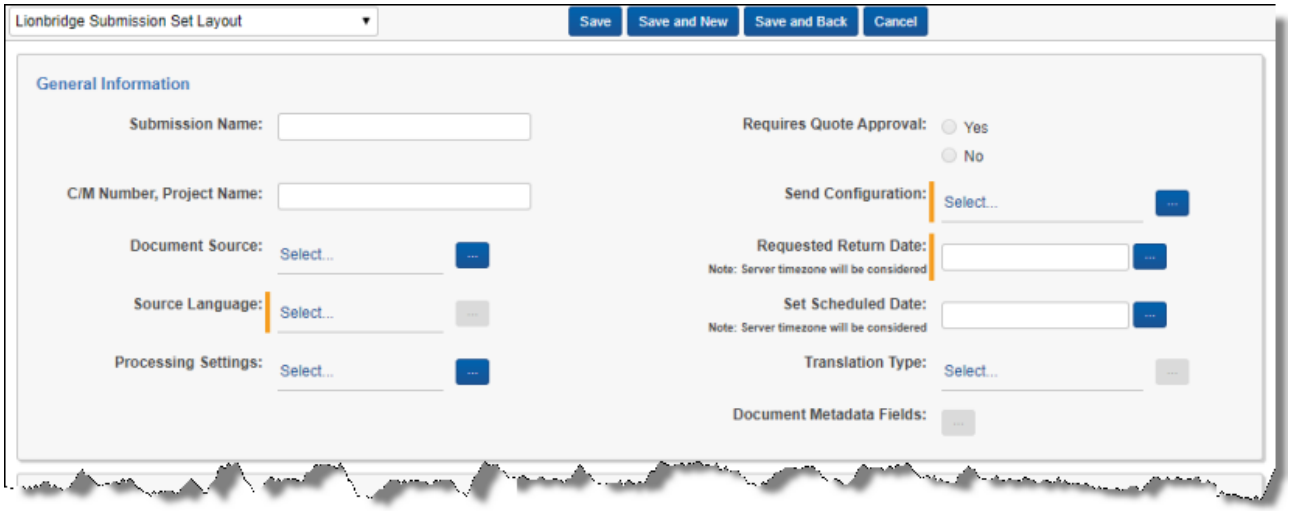
To create a submission set:

1. Click a workspace where the App is installed.
2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.



3. Click **New Lionbridge Submission Set**.

   The **Lionbridge Submission Set Layout** opens.



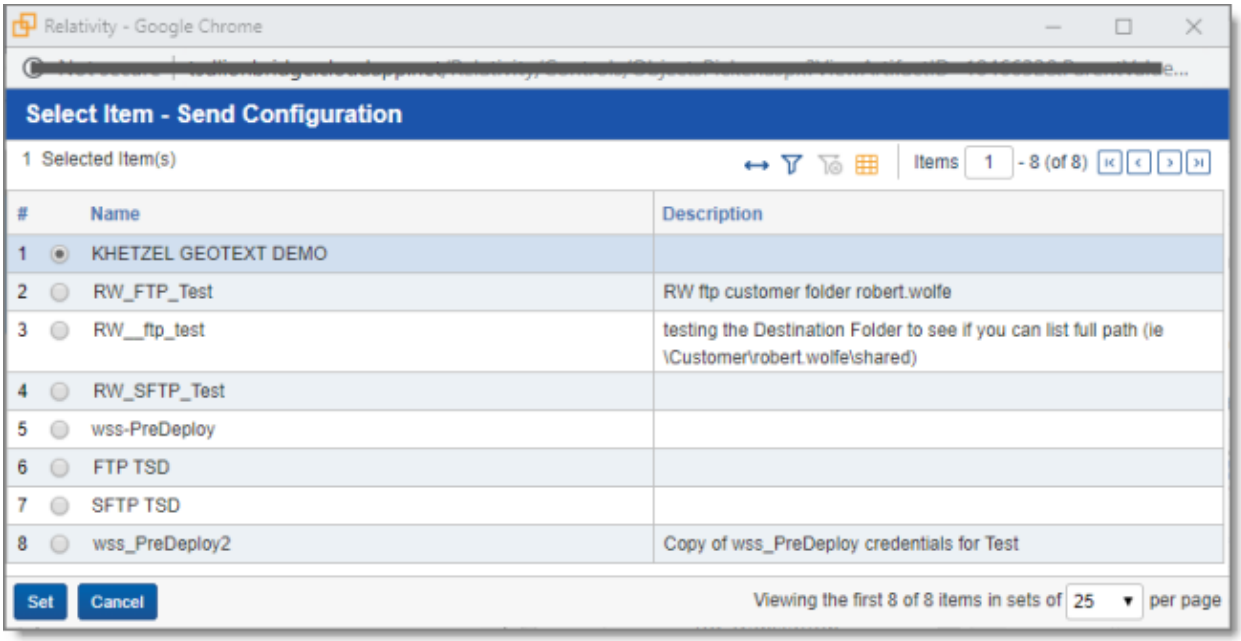
4. Enter the following information in the **General Information** section:

Field	Description
Submission Name	Your name for this submission set.
C/M Number, Project Name	The purchase order (PO) number for this submission set.

5. In **Send Configuration**, you select the translation-provider configuration to use when sending this submission set out for translation. For information about translation-provider configurations, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

   Note: You must select the translation-provider configuration before you can populate the **Source Language**, **Translation Type**, and **Document Metadata Fields** fields or selecting a Requires Quote Approval radio button.

   a. Click the ellipsis button ... to open the **Select Item - Send Configuration** dialog box in a new browser window.



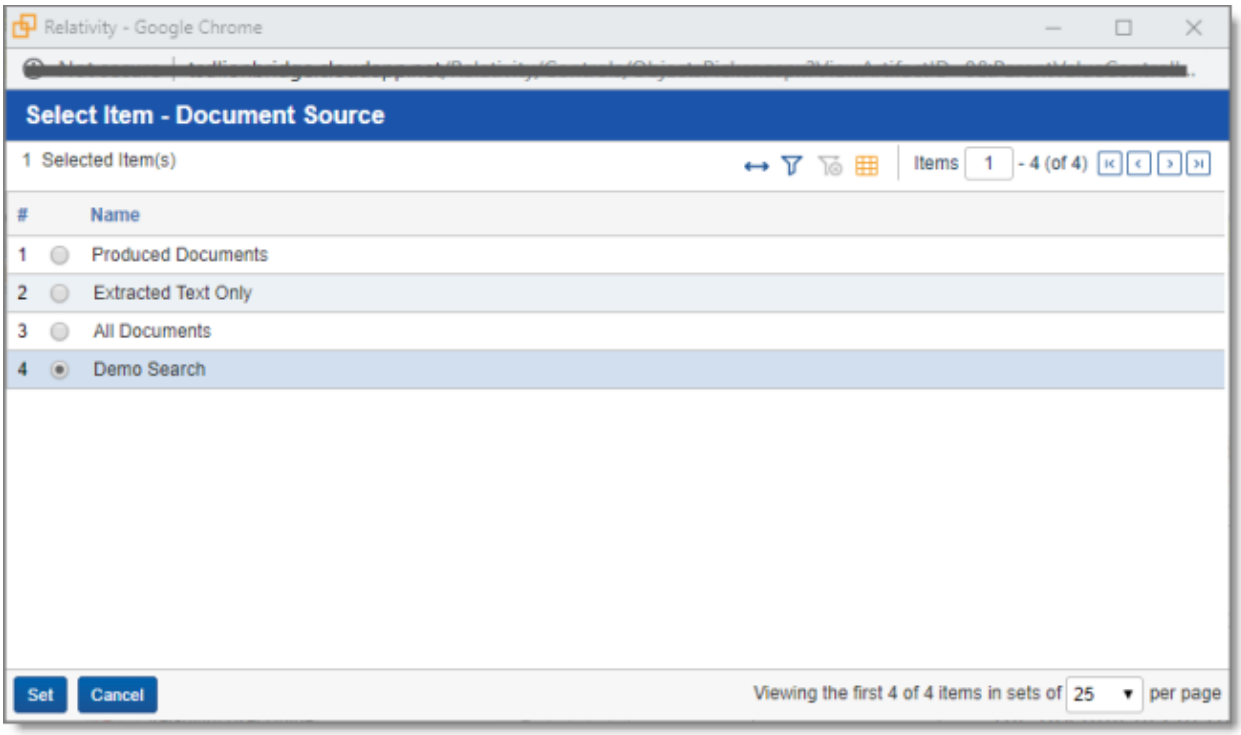
   b. Select the translation-provider configuration and click **Set**.

6. Optional. In **Document Source**, you can select the *saved search* containing the documents to add to this submission set. By default, this adds all the documents in a saved search to the submission set. Later, in step 17, you can exclude specific documents in the saved search from the submission set. For

information about saved searches, refer to the Relativity documentation at: https://help.relativity.com/9.7/Content/Relativity/Saved_search/Saved_search.htm.

Tip: If you are using a different version of Relativity, you can use the **Version** dropdown list in the documentation to navigate to the correct documentation version.

a. Click the ellipsis button ... to open the **Select Item - Document Source** dialog box in a new browser window.



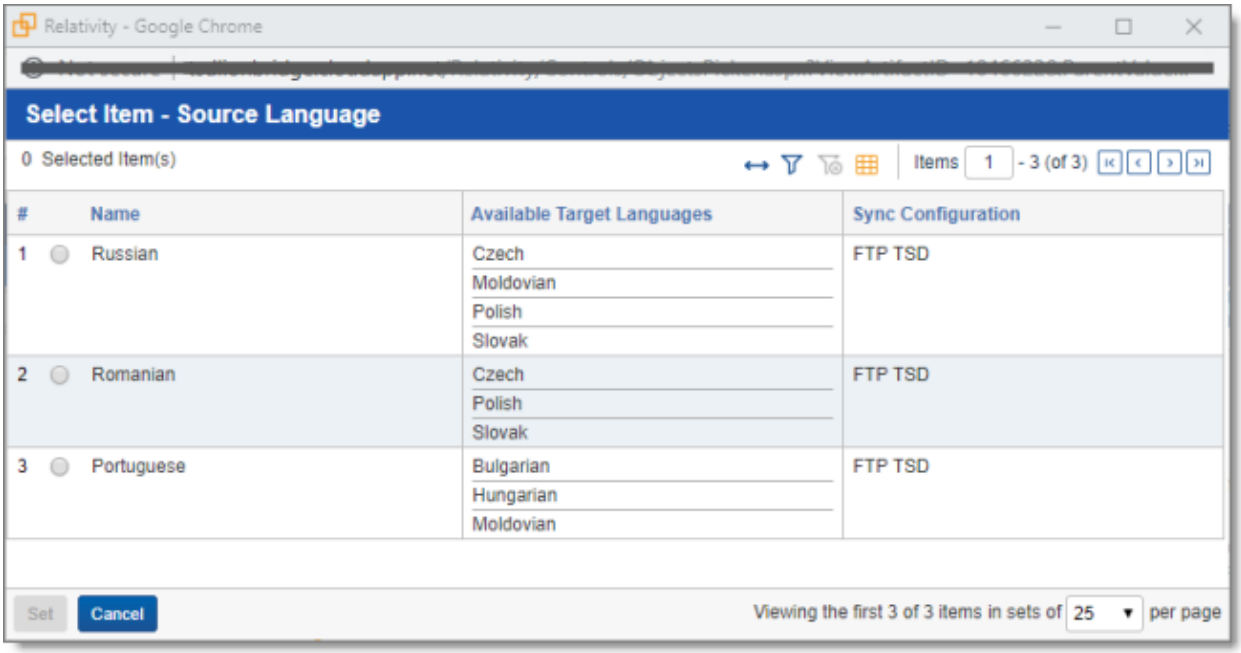
b. Select the document source and click **Set**.

Tip: You can select a saved search, which is a saved set of criteria that returns the latest documents meeting those criteria.

7. In **Source Language**, select the original language of the documents to send for translation.

Note: The translation-provider configuration selected above in **Send Configuration** determines the available source languages.

a. Click the ellipsis button to open the **Select Item - Source Language** dialog box in a new browser window.

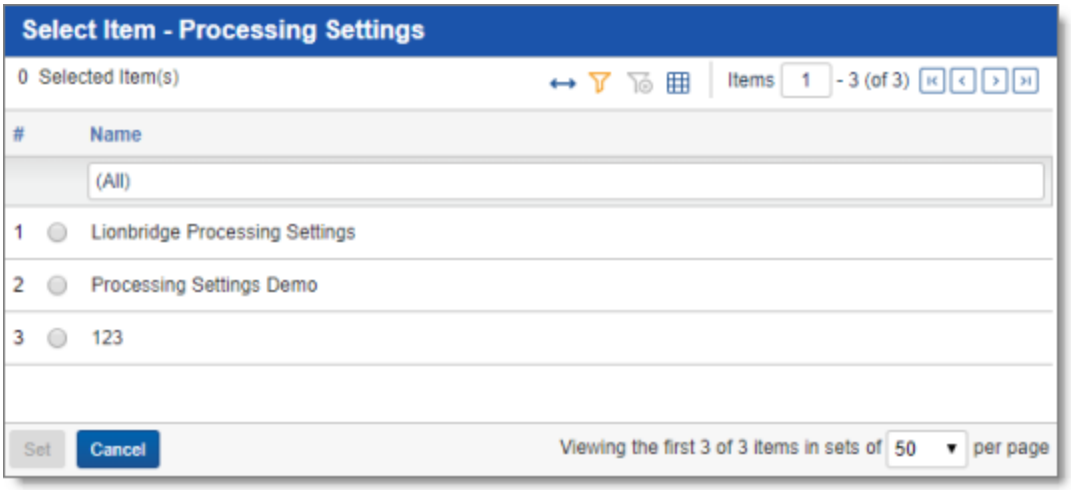


- The **Name** column displays the available source languages.
- The **Available Target Languages** column displays which target languages are available for each source language.
- The **Sync Configuration** column displays the **Send Configuration** (translation provider configuration) for which the source-target language pairs are supported.

b. Select the source language and click **Set**.

8. Available only if processing settings were configured. In **Processing Settings**, select the processing settings to use. Selecting a set of processing settings enables you to view all translations, in supported document types, within the translation viewer and access your translated documents in the **Documents** tab. These settings include the processing profile, destination folder, and time zone. For more information about processing settings, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

a. Click the ellipsis button ... to open the **Select Item - Processing Settings** dialog box in a new browser window.

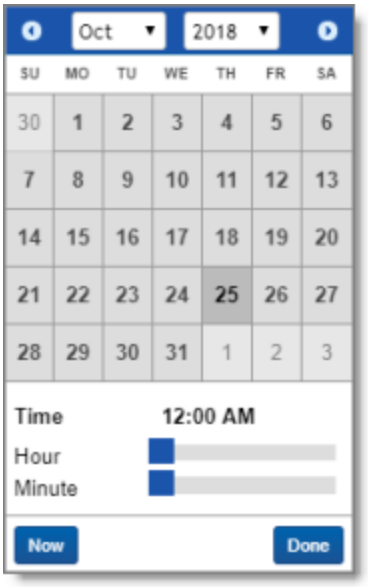


The **Name** column displays the configured processing settings.

b. Select the processing settings and click **Set**.

9. Available and required only if your translation provider is Lionbridge Freeway, which is determined by the translation-provider configuration you selected in **Send Configuration** described above. You use the **Requires Quote Approval** option to inform the translation provider whether you want to receive a quote before the translation process starts.
   - To request a quote, click **Yes**.
   - If you do not want to request a quote, click **No**.
10. Required. You use **Requested Return Date** to select a deadline for completing the translation.

a. Click the ellipsis button ... to open the **date and time selector**.



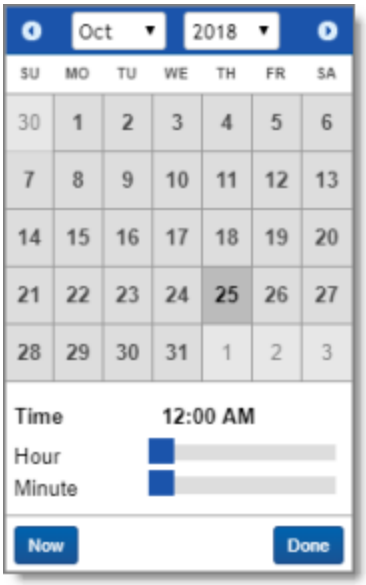
b. Select a date and time in the calendar, and click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

11. You can use **Set Scheduled Date** to schedule the date and time for sending this submission set for translation.

Note: You can schedule the date to send this submission set for translation later, after creating the submission set. For details, see "Scheduling a Submission Set for Translation" on page 44.

a. Click the ellipsis button ... to open the **date and time selector**.



b. Do one of the following:

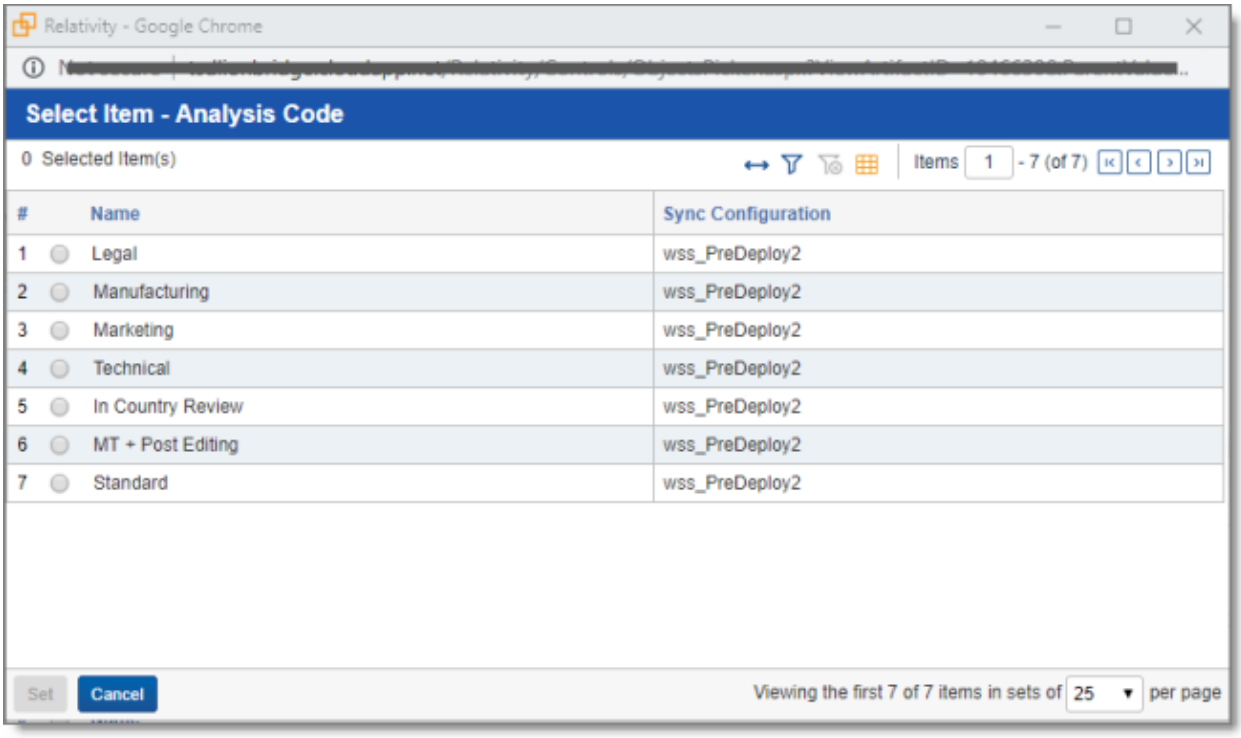
- To schedule sending the submission set in the future, select a date and time in the calendar.
- To send the submission set now, click **Now**.

c. Click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

12. Available and required only if your translation provider is Lionbridge Freeway, which is determined by the translation-provider configuration you selected in **Send Configuration**, described above. You use the **Translation Type** option to specify a Freeway analysis code for this submission set.

a. Click the ellipsis button ... to open the **Select Item - Analysis Code** dialog box in a new browser window.

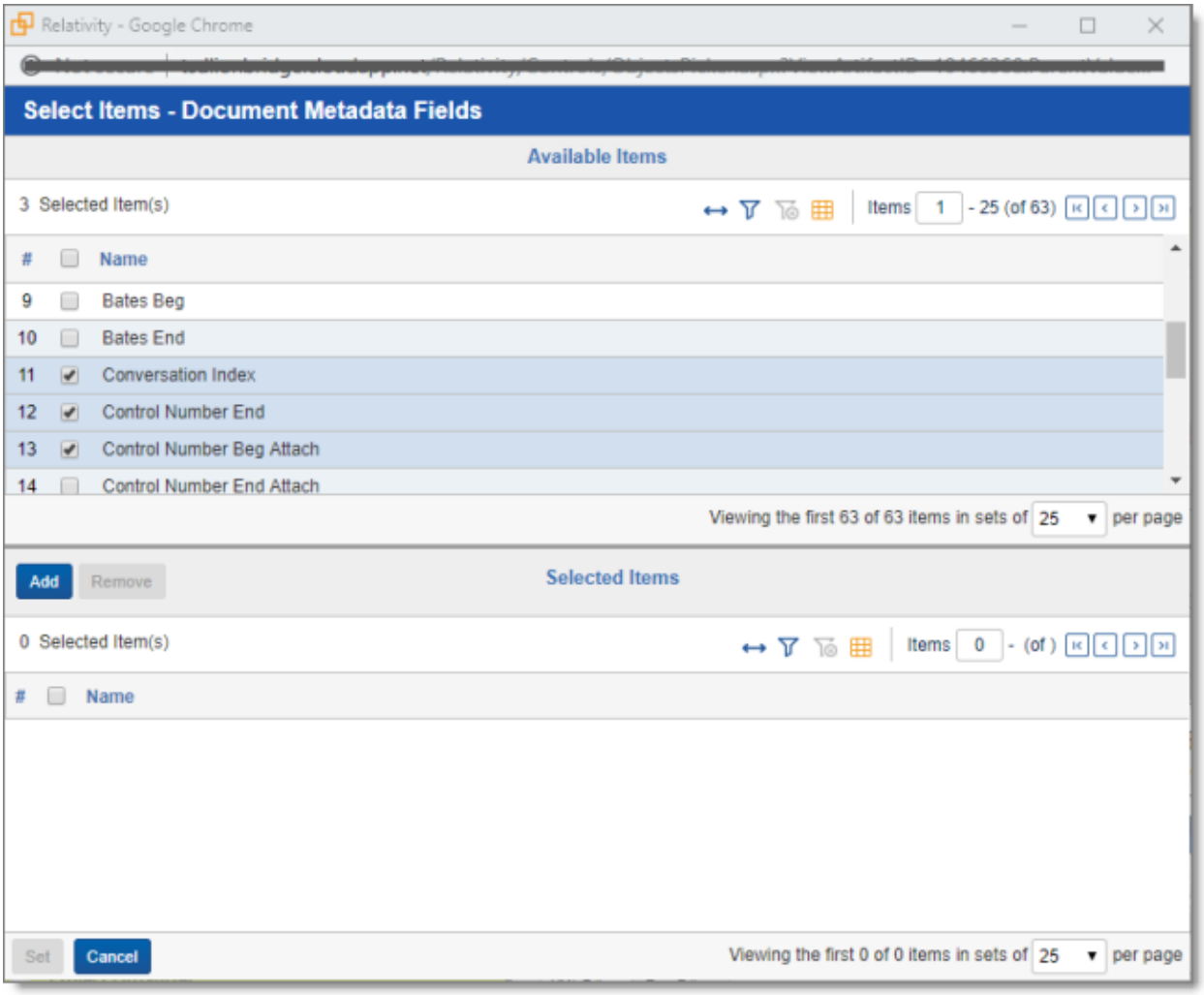


b. Select the Freeway analysis code for this submission set and click **Set**.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for Lionbridge Freeway.

13. Available only if your translation-provider configuration is for FTP or SFTP, which you selected in **Send Configuration**, described above. You can use the **Document Metadata Fields** feature to specify which fields in the documents in this submission set are metadata. These fields are included in a `.txt` file that is delivered to the FTP or SFTP server.

a. Click the ellipsis button ... to open the **Select Item - Document Metadata Fields** dialog box in a new browser window.



b. In the top part of the dialog box, select the check boxes of the metadata fields in the documents in this submission set and click **Add**.

Note: The **Add** button is available only when at least one metadata field is selected.

The selected metadata fields are now displayed at the bottom of the dialog box.

c. In the bottom part of the dialog box, click **Set** to save your change and close this dialog box.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for FTP or SFTP.

14. Enter the following information in the **Additional Information** section:

Field	Description
Additional Instructions	Enter any requests, additional information, or guidance for the translator.
Consistency State	This read-only field is populated after the submission set is created.
Email Recipients	Enter the email addresses of the recipients of notifications about this submission set. Separate multiple email addresses with a semi-colon (;). The recipients will receive email notifications about translation-status events, for example, when the submission set has been delivered to Lionbridge Freeway or to the FTP or SFTP site. For more information, see "Receiving Email Notifications" on page 83.
Reference File	You can send reference files (support assets) to your translation provider as part of a submission set. This provides helpful context for the translator. ▸ Click **Choose File**. Then navigate to the reference file and select it to upload it and add it to the submission set.
Status Message	This read-only field is populated after the submission set is submitted for translation.
Consistency Message	This read-only field is populated after the submission set is created.
Project ID	This read-only field is populated after the submission set is submitted for translation to Lionbridge Freeway. It is displayed only if the translation-provider configuration selected in **Send Configuration**, above, is for Lionbridge Freeway.

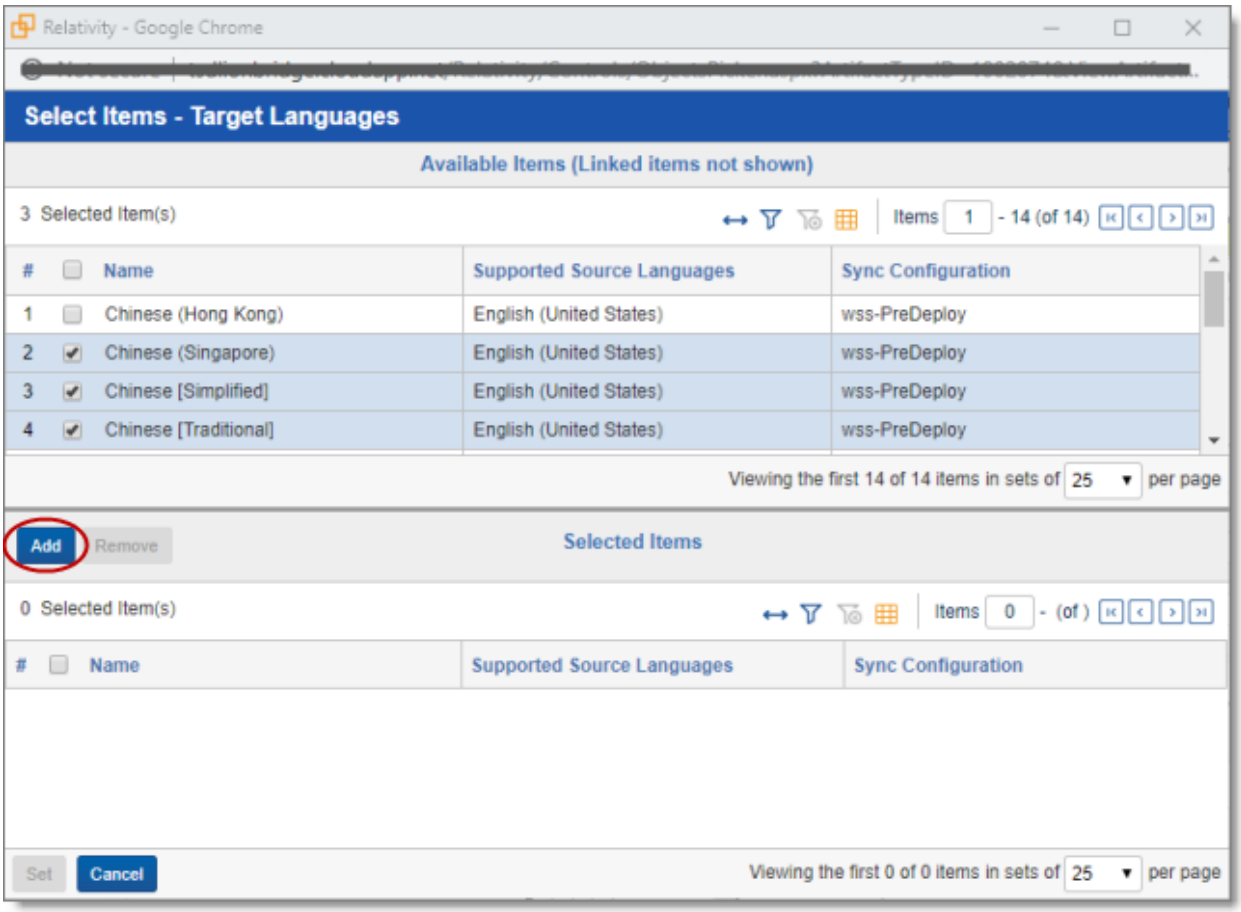
15. Click **Save**.

The **Lionbridge Submission Set Layout** updates.

16. Select the target languages for this submission set.

    a. In the **Target Languages** section, click the **Link** button.

The **Select Items - Target Languages** dialog box opens in a new browser window.



    b. In the top part of the dialog box, select the check boxes for the target languages to configure for this source language, and click **Add**.

Note: The **Add** button is available only after selecting at least one check box.

The selected target languages are now displayed at the bottom of the dialog box.

c. Click **Set** to save your change and close this dialog box.

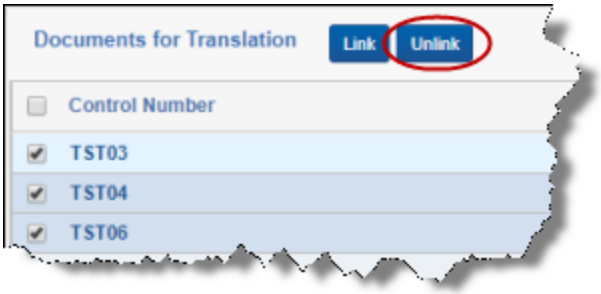
Note: The **Set** button is available only after clicking **Add** in the previous sub-step.

The **Lionbridge Submission Set Layout** updates.

17. Optional. Modify which documents are included in this submission set. By default, all the documents in the saved search, selected in the **Document Source** field, described in step 6, above, are included in the submission set.

- To remove documents from the submission set:

a. In the **Documents for Translation** section, select the documents to remove from the submission set and click the **Unlink** button.



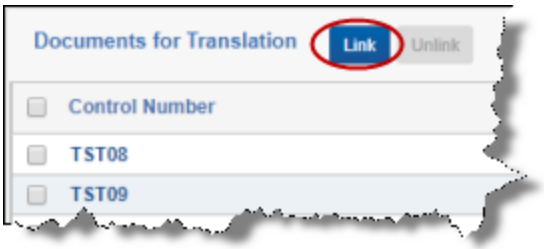
A message box confirms that you want to remove the selected documents.

b. Click **OK**.

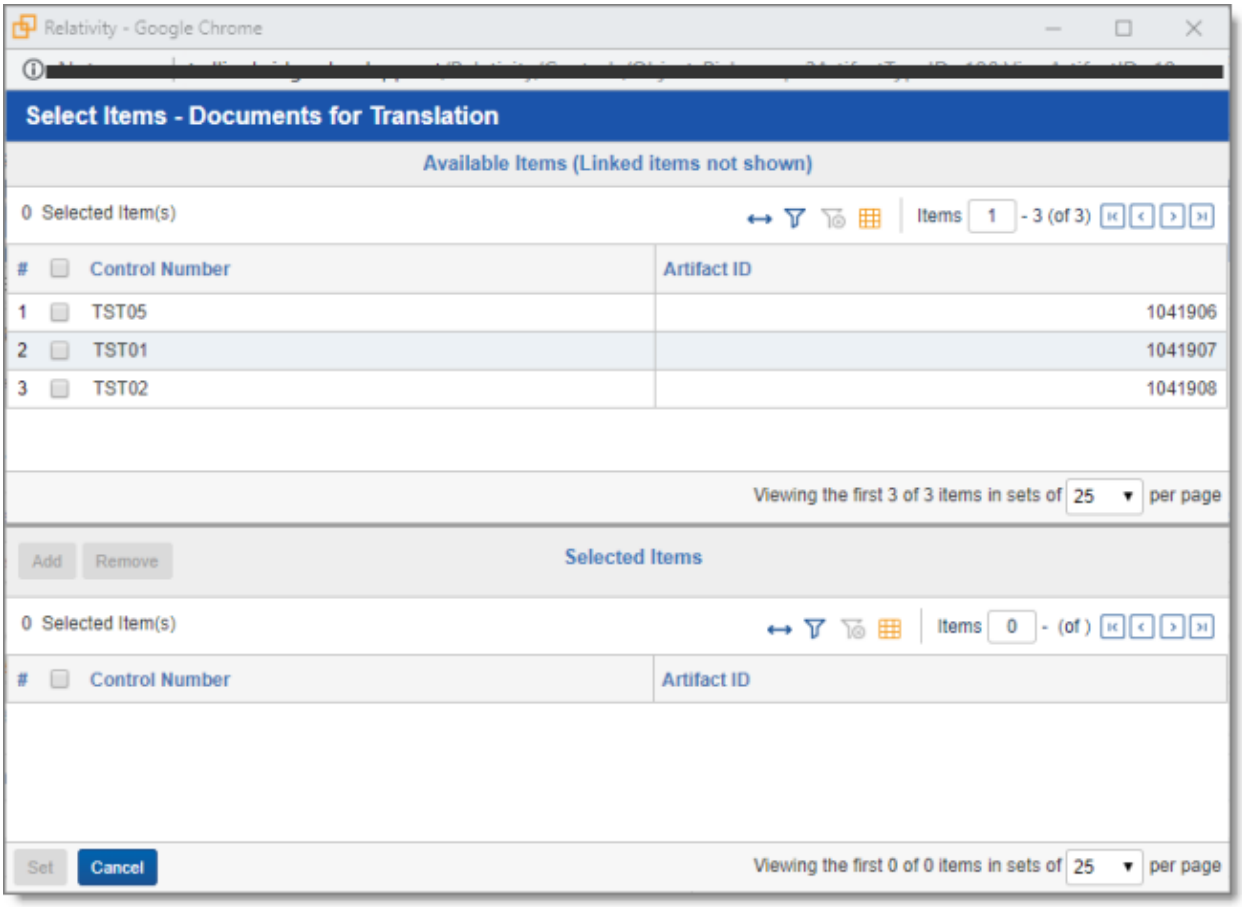
The **Lionbridge Submission Set Layout** updates.

- To add back previously removed documents to the submission set:

a. In the **Documents for Translation** section, click the **Link** button.



The **Select Items - Documents for Translation** dialog box opens in a new browser window, displaying all the documents in the saved search that were removed from the submission set.



b. In the top part of the dialog box, select the check boxes for the documents to add, back to the submission set, and click **Add**.

Note: The **Add** button is available only after selecting at least one check box.

The selected documents are now displayed at the bottom of the dialog box.

c. Click **Set** to save your change and close this dialog box.

Note: The **Set** button is available only after clicking **Add** in the previous sub-step.

The **Lionbridge Submission Set Layout** updates.

18. Click a **Save** button at the top of the layout.

3.2 Editing a Submission Set

Note: You cannot edit a submission set that has already been submitted for translation or canceled.

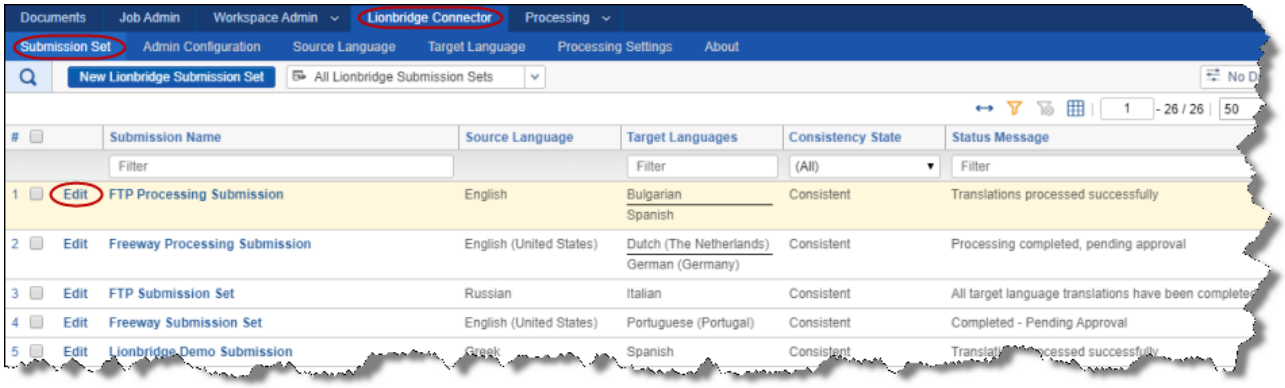
A submission set enables you to send multiple documents for translation from the same source language into the same set of target languages with common metadata. You *edit* a submission set to modify its parameters after creation. For more information about submission sets, see "Planning Your Translations with Submission Sets" on page 16.

For instructions on adding documents to a submission set after creation, see:

- "Adding One Document to a Submission Set" on page 39
- "Adding Multiple Documents to a Submission Set" on page 41

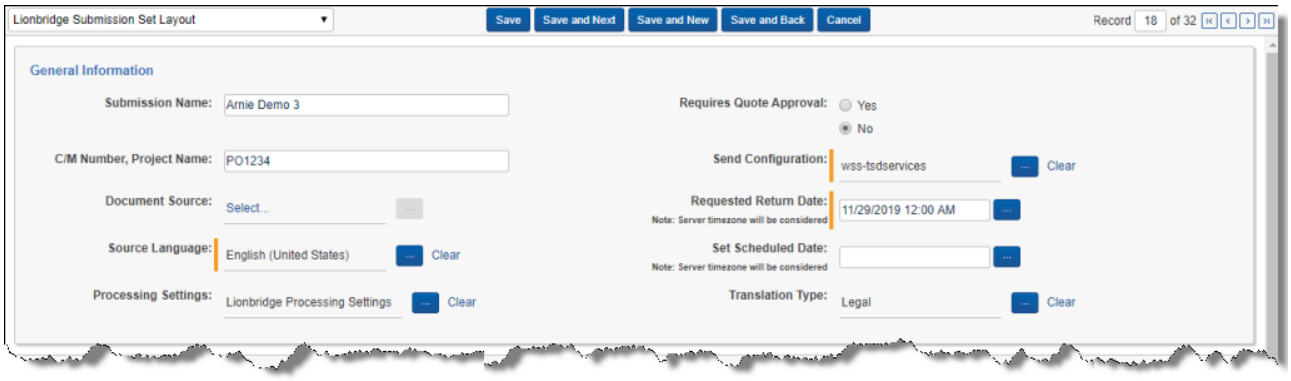
To edit a previously created submission set:

1. Click a workspace where the App is installed.
2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.



3. Click the **Edit** link beside a submission set.

   The **Lionbridge Submission Set Layout** opens.



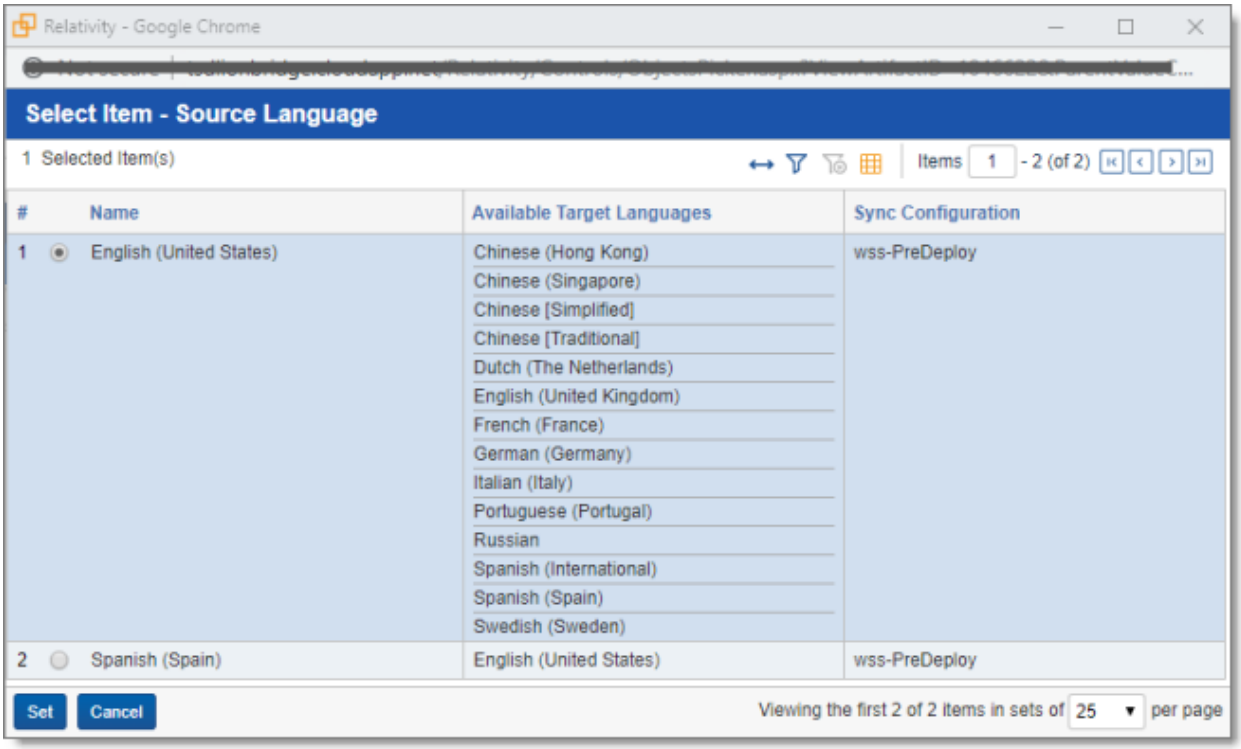
4. You can edit the following fields in the **General Information** section:

Field	Description
Submission Name	Your name for this submission set.
C/M Number, Project Name	The purchase order (PO) number for this submission set.
Document Source	This field is not editable. To add documents to a submission set after creation, see: ■ "Adding One Document to a Submission Set" on page 39 ■ "Adding Multiple Documents to a Submission Set" on page 41

5. In **Source Language**, you can change the original language of the documents to send for translation.

   Note: The translation-provider configuration selected in **Send Configuration**, described below, determines the available source languages.

   a. Click the ellipsis button ... to open the **Select Item - Source Language** dialog box in a new browser window.

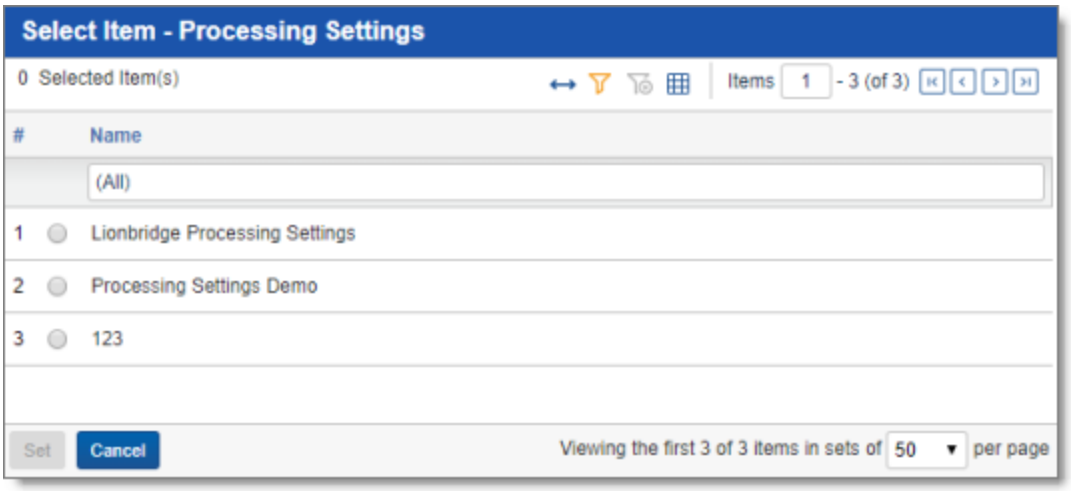


- The **Name** column displays the available source languages.
- The **Available Target Languages** column displays which target languages are available for each source language.
- The **Sync Configuration** column displays the **Send Configuration** (translation provider configuration) for which the source-target language pairs are supported.

b. Select a different source language and click **Set**.

6. Available only if processing settings were configured. In **Processing Settings**, you can change the processing settings to use. Selecting a set of processing settings enables you to view all translations, in supported document types, within the translation viewer and access your translated documents in the **Documents** tab. These settings include the processing profile, destination folder, and time zone. For more information about processing settings, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

a. Click the ellipsis button to open the **Select Item - Processing Settings** dialog box in a new browser window.



The **Name** column displays the configured processing settings.

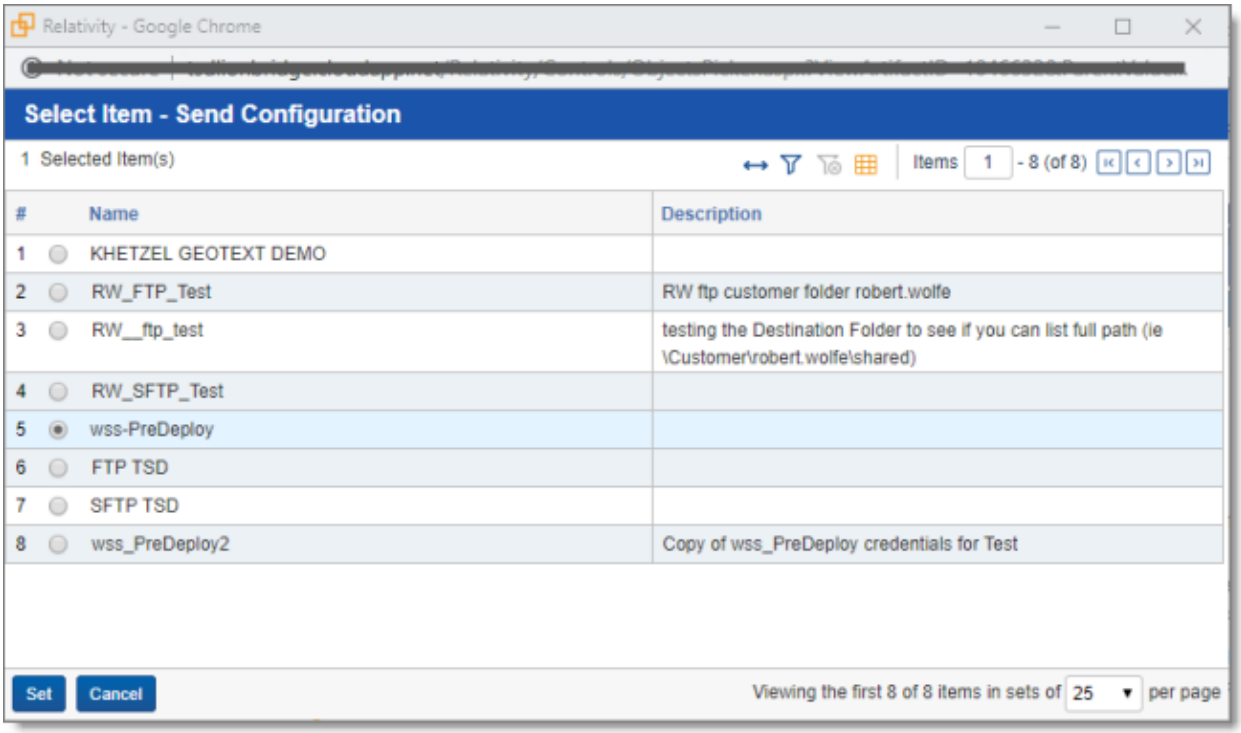
b. Select the processing settings and click **Set**.

7. Available and required only if your translation provider is Lionbridge Freeway, which is determined by the translation-provider configuration you selected in **Send Configuration** described below. You use the **Requires Quote Approval** option to inform the translation provider whether you want to receive a quote before the translation process starts.

- To request a quote, click **Yes**.
- If you do not want to request a quote, click **No**.

8. In **Send Configuration**, you can change the translation-provider configuration to use when sending this submission set out for translation. For information about translation-provider configurations, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

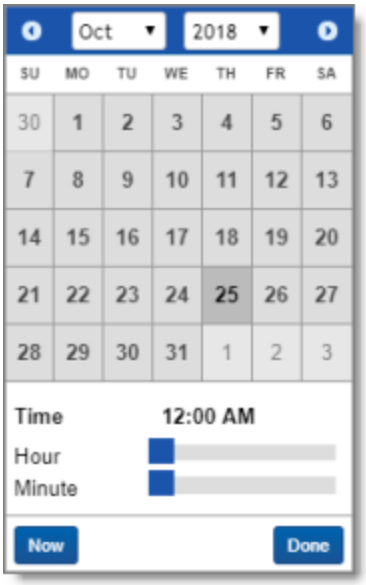
   a. Click the ellipsis button ... to open the **Select Item - Send Configuration** dialog box in a new browser window.



   b. Select a different translation-provider configuration and click **Set**.

9. You can change the **Requested Return Date**, which specifies a deadline for completing the translation.

a. Click the ellipsis button ... to open the **date and time selector**.

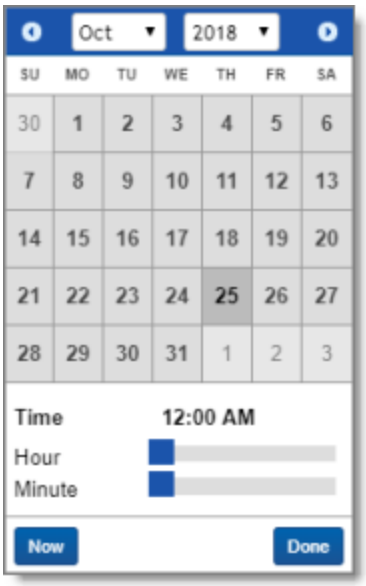


b. Select a date and time in the calendar, and click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

10. You can change the **Set Scheduled Date** to schedule the date and time for sending this submission set for translation.

a. Click the ellipsis button ... to open the **date and time selector**.



b. Do one of the following:

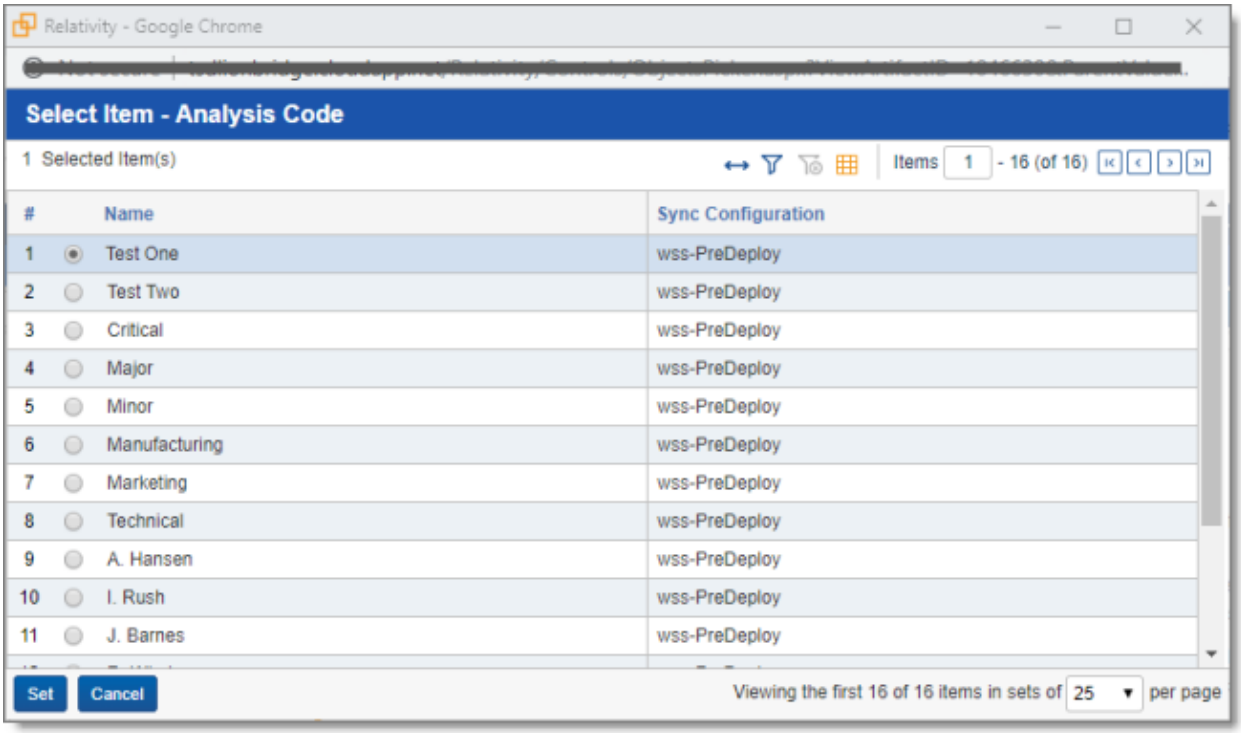
- To schedule sending the submission set in the future, select a date and time in the calendar.
- To send the submission set now, click **Now**.

c. Click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

11. Available and required only if your translation provider is Lionbridge Freeway, which is determined by the translation-provider configuration you selected in **Send Configuration**, described above. You can change the **Translation Type** option to specify a different Freeway analysis code for this submission set.

a. Click the ellipsis button ... to open the **Select Item - Analysis Code** dialog box in a new browser window.



b. Select the Freeway analysis code for this submission set and click **Set**.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for Lionbridge Freeway.

12. You can update the following information in the **Additional Information** section:

Field	Description
Additional Instructions	Enter any requests, additional information, or guidance for the translator.
Consistency State	This read-only field is populated after the submission set is created. It displays either: ■ `Consistent`, which indicates that the parameters specified for this submission set are consistent and you can send the submission set for translation. ■ A message about any inconsistencies in the parameters specified for this submission set. For example, it can display a message if an unsupported analysis code is selected. **Important:** You must resolve the inconsistencies before you can submit the submission set for translation.
Email Recipients	Enter the email addresses of the recipients of notifications about this submission set. Separate multiple email addresses with a semi-colon (`;`). The recipients will receive email notifications about translation-status events, for example, when the submission set has been delivered to Lionbridge Freeway or to the FTP or SFTP site. For more information, see "Receiving Email Notifications" on page 83.
Reference File	You can send reference files (support assets) to your translation provider as part of a submission set. This provides helpful context for the translator. ▸ Click **Choose File**. Then navigate to the reference file and select it to upload it and add it to the submission set.
Status Message	This read-only field is populated after the submission set is submitted for translation.

Field	Description
Consistency Message	This read-only field is populated after the submission set is created. It displays either: ■ If the read-only **Consistency State** field, described above, displays `Consistent`, then this field displays `Set [`*submission set name*`] is consistent.` ■ If the read-only **Consistency State** field, described above, displays an inconsistency message, then this field displays a details about the inconsistencies. For example, if an unsupported analysis code is selected in the **Translation Type** option, this field provides additional detail, such as the name of the analysis code and that it is not supported for the specified **Send Configuration**, described above.
Project ID	This read-only field is populated after the submission set is submitted for translation to Lionbridge Freeway. It is displayed only if the translation-provider configuration selected in **Send Configuration**, above, is for Lionbridge Freeway.

13. Click a **Save** button at the top of the layout.

    The **Lionbridge Submission Set Layout** updates.

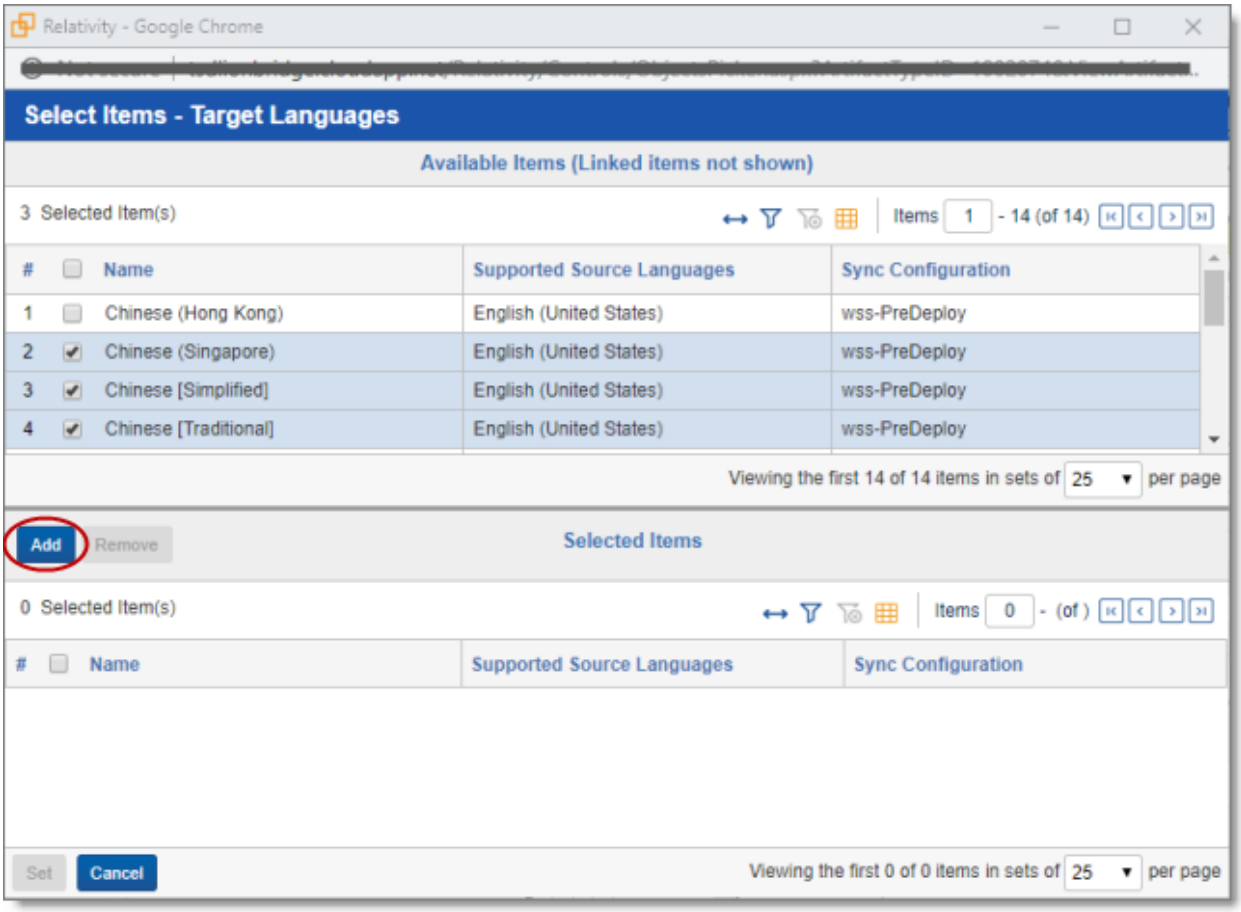
14. You can select different target languages for this submission set.

    - To delete previously selected target languages, in the **Target Languages** section, select the languages to remove, and then click the **Unlink** button.

    - To add additional target languages:

a. in the **Target Languages** section, click the **Link** button.

The **Select Items - Target Languages** dialog box opens in a new browser window.



b. In the top part of the dialog box, select the check boxes for the target languages to configure for this source language, and click **Add**.

Note: The **Add** button is available only after selecting at least one check box.

The selected target languages are now displayed at the bottom of the dialog box.

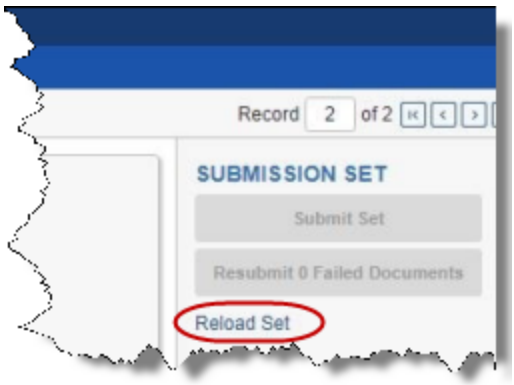
c. Click **Set** to save your change and close this dialog box.

Note: The **Set** button is available only after clicking **Add** in the previous sub-step.

The **Lionbridge Submission Set Layout** updates.

15. If you made any changes to the target languages in the previous step, click a **Save** button at the top of the layout.

16. After editing your submission set, you should recheck that the parameters specified are consistent. Click the **Reload Set** link in the top-right corner, and then recheck the **Consistency State** and **Consistency Message** fields, described above in step 11. If an inconsistency message is displayed, edit your submission set again to resolve any consistency issues.



3.3 Adding One Document to a Submission Set

You can add a single document to a submission set that you already created.

Important: When adding a document to a submission set, ensure that the source and target languages of the document match those configured for the submission set.

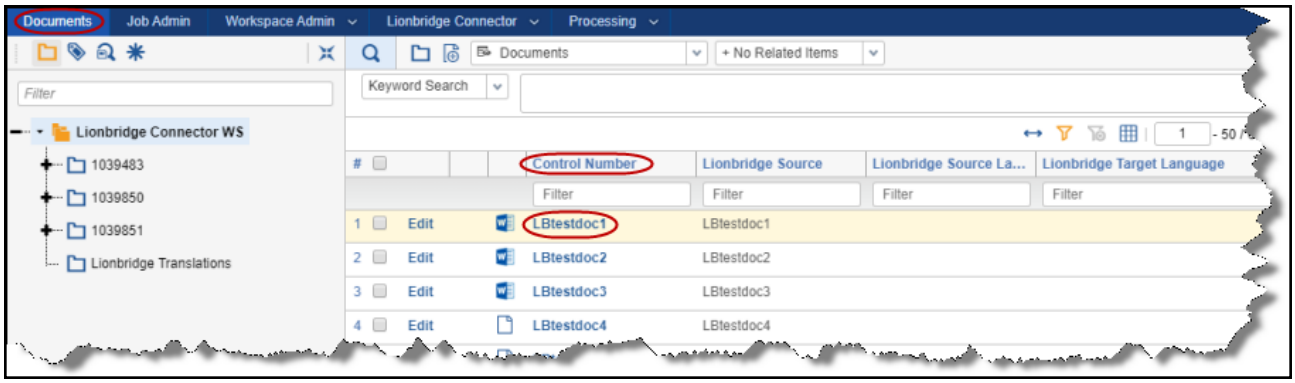
For more information about submission sets, see "Planning Your Translations with Submission Sets" on page 16.

For instructions on adding multiple documents to a submission set, see "Adding Multiple Documents to a Submission Set" on page 41.

To add a new single document to an existing submission set:

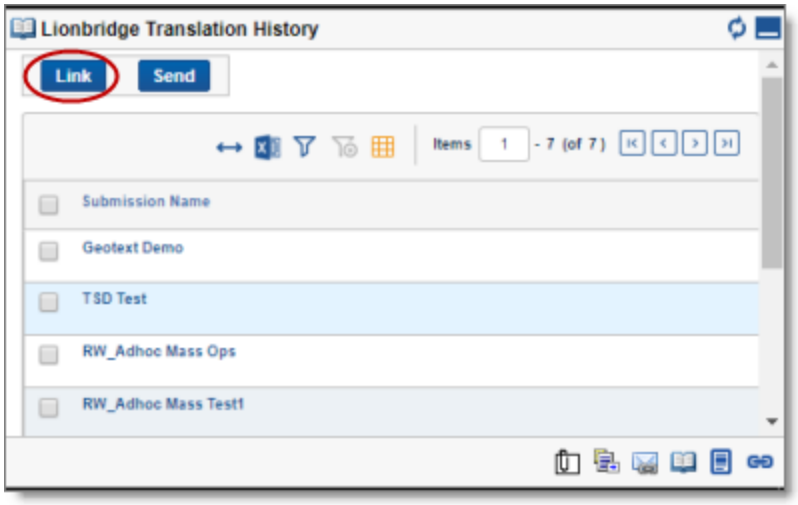
1. Click a workspace where the App is installed.

2. Click the **Documents** tab to display a list of available documents.



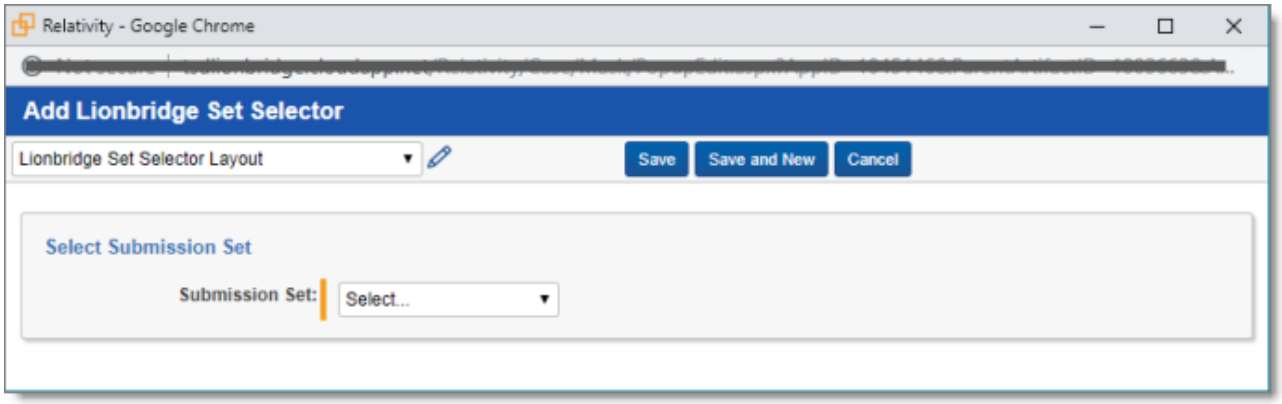
3. In the **Control Number** column, click a document's control number to open it in the viewer.
4. At the bottom of the **Document Metadata** pane, which is on the right side of the document viewer, click the **Lionbridge Translation History** icon .

   The **Lionbridge Translation History** pane opens.



5. Click the **Link** button.

The **Add Lionbridge Set Selector** dialog box opens in a new browser window.



6. In the **Submission Set** dropdown list, select the submission set to which to add this document, and click **Save**.

The App adds the document to the selected submission set and closes the dialog box.

3.4 Adding Multiple Documents to a Submission Set

You can add multiple documents to a submission set that you already created.

Important: When adding documents to a submission set, ensure that the source and target languages of the documents match those configured for the submission set.

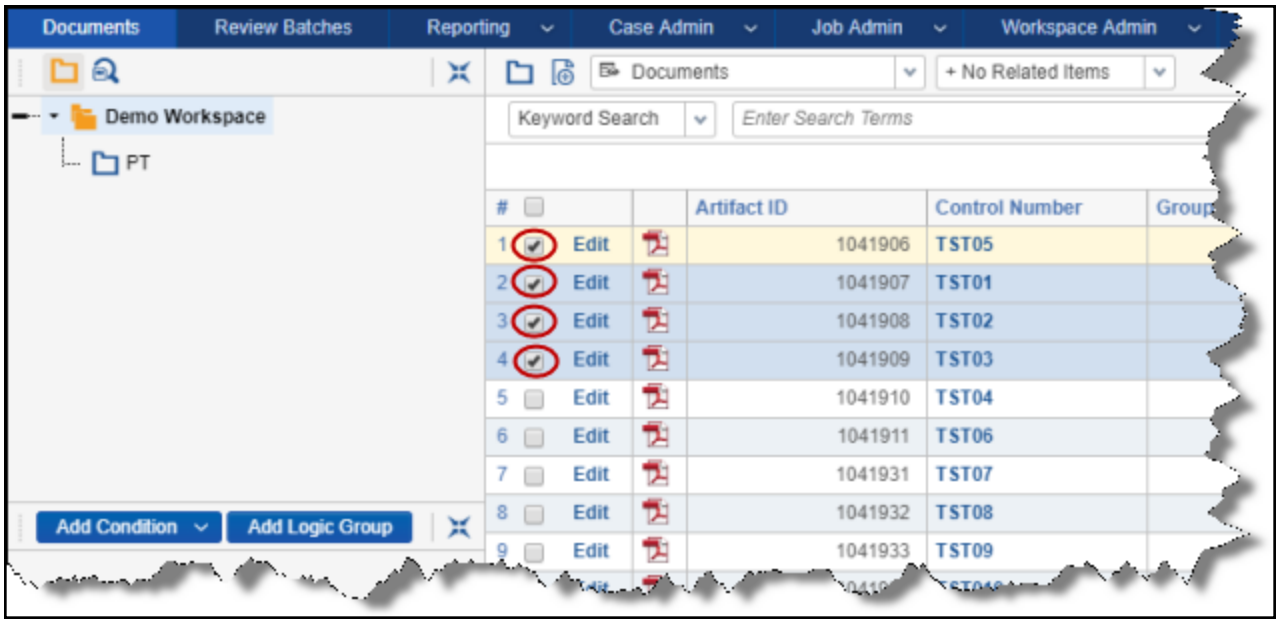
For more information about submission sets, see "Planning Your Translations with Submission Sets" on page 16.

For instructions on adding a single document to a submission set, see "Adding One Document to a Submission Set" on page 39.

To add multiple documents to an existing submission set:

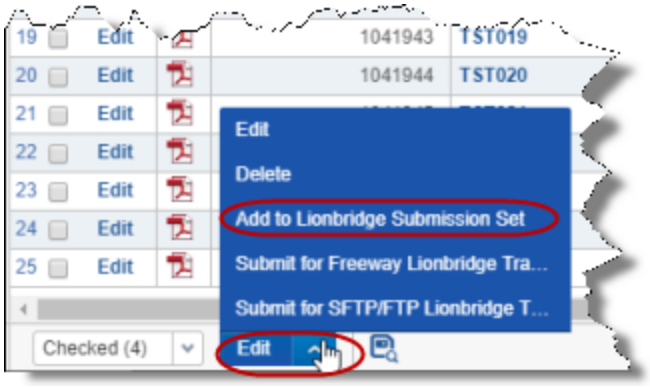
1. Click a workspace where the App is installed.

2. Click the **Documents** tab to display a list of available documents.

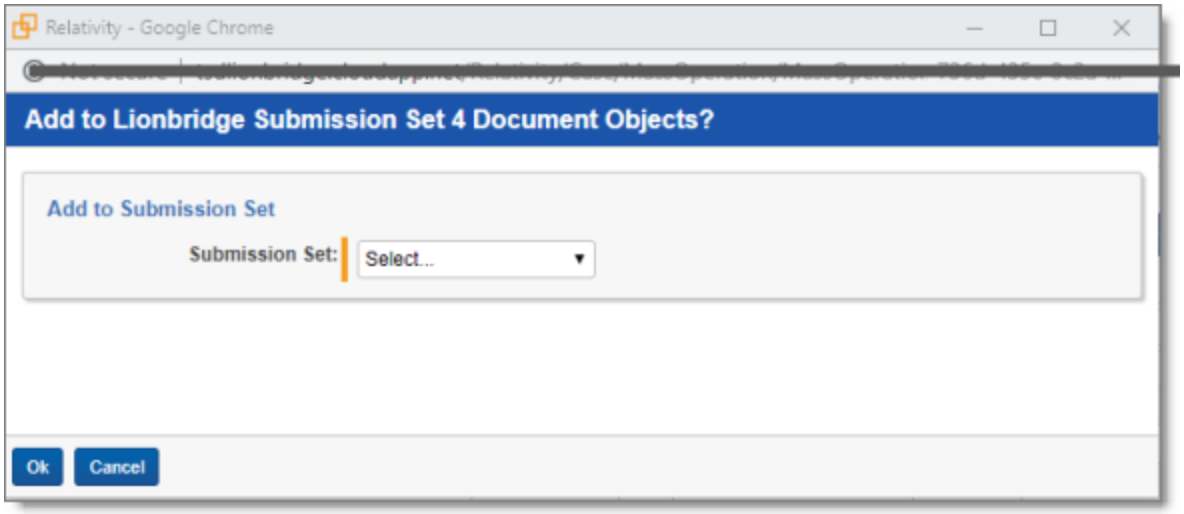


3. Select the check boxes next to the documents to add to the submission set.

4. At the bottom of the tab, click the **Edit** menu and then click **Add to Lionbridge Submission Set**.



The **Add to Lionbridge Submission Set** dialog box opens in a new browser window.



5. In the **Submission Set** dropdown list, select the submission set to which to add these documents, and click **OK**.

The App adds the documents to the selected submission set and closes the dialog box.

4 Submitting Content for Translation

4 Submitting Content for Translation

When you submit content for translation, you can either schedule it in advance or submit it immediately. All content that you submit for translation, is submitted as a submission set.

- If you schedule content for translation in advance, the documents must be in a previously created *submission set*, which is a grouping of multiple documents with the same metadata. For more information about submission sets, see "Planning Your Translations with Submission Sets" on page 16.. For instructions on creating a submission set, see page 17. For instructions on scheduling a previously created submission set, see page 44.
- There are multiple ways to immediately submit content for translation.
  - If you already created a submission set, you can submit it immediately for translation. For detailed instructions, see page 46.
  - You can submit a single document for translation. This automatically creates a submission set. For detailed instructions, see page 48.
  - You can submit multiple documents for translation. This automatically creates a submission set.
    - For detailed instructions on submitting multiple documents to Lionbridge Freeway, see page 58.
    - For detailed instructions on submitting multiple documents to an FTP or an SFTP server, see page 66.

Note for submissions to Lionbridge Freeway: You can cancel a submission set after submission by clicking the **Cancel Project** button in the top-right corner of the **Lionbridge Submission Set Layout**. This button is available after submission and before the submission set is in `In Translation` status. For a list and description of translation statuses, see "Translation Statuses" on page 82.

Note for submissions to an FTP or SFTP server: If an unexpected error occurs while submitting a submission set to an FTP or SFTP server, you can resubmit the documents that were not submitted properly. For detailed instructions, see page 75.

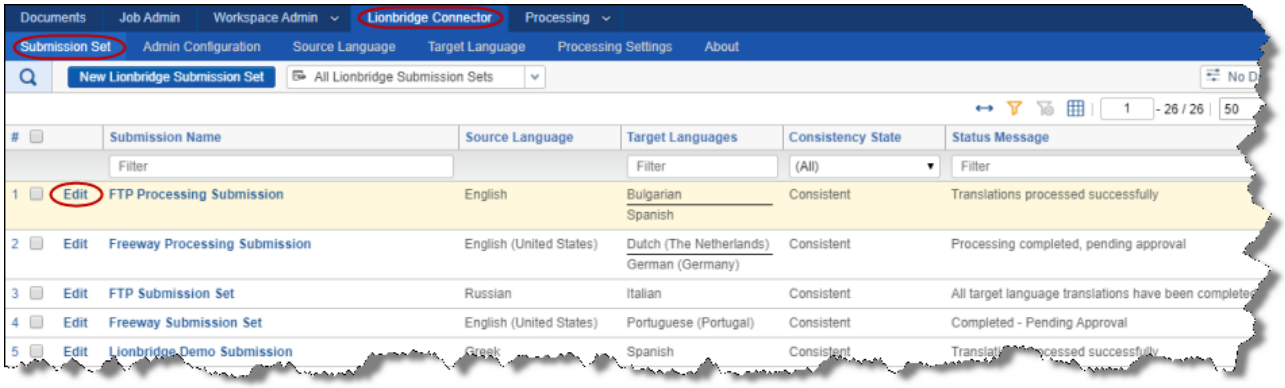
4.1 Scheduling a Submission Set for Translation

If you created a submission set, as described in "Planning Your Translations with Submission Sets" on page 16, you can schedule it for submission to your translation provider.

For instructions on creating and scheduling a new submission set, see "Creating a Submission Set" on page 17.

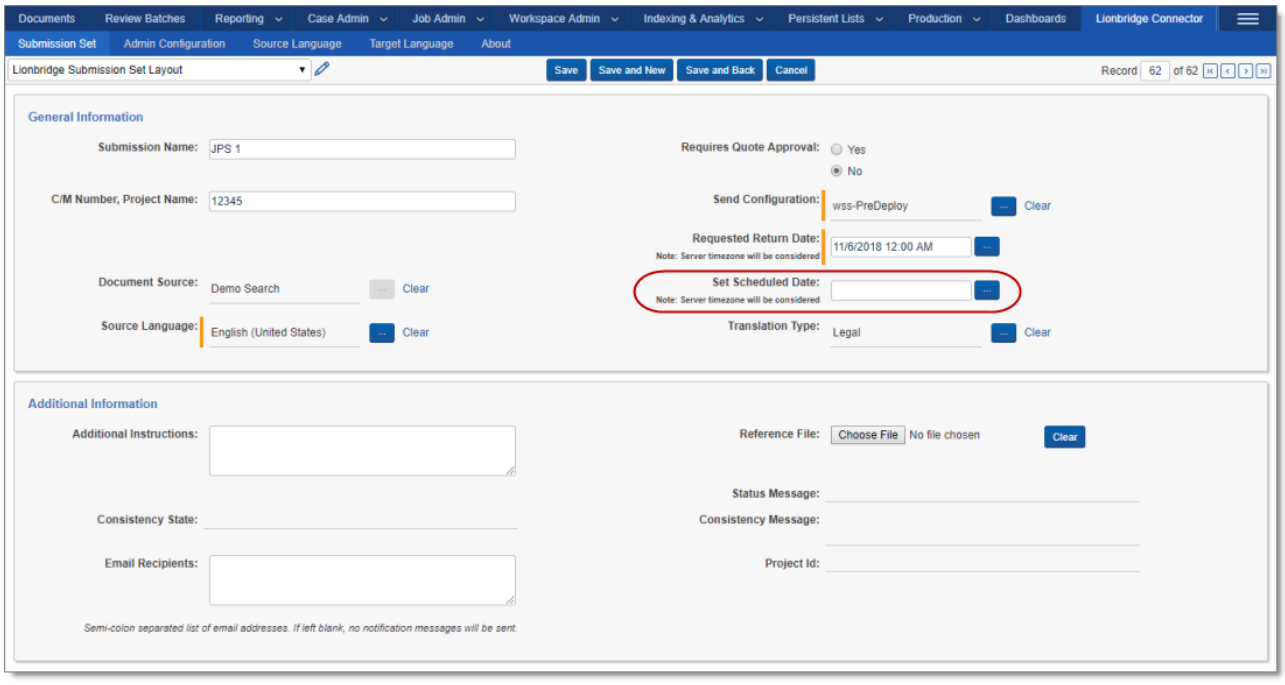
To schedule a submission set:

1. Click a workspace where the App is installed.
2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.



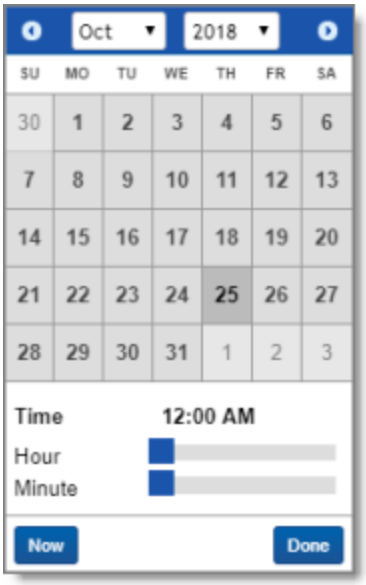
3. Click the **Edit** link beside a submission set.

   The **Lionbridge Submission Set Layout** opens.



4. Use **Set Scheduled Date** to schedule the date and time for sending this submission set for translation.

a. Click the ellipsis button ... to open the **date and time selector**.



b. Do one of the following:

- To schedule sending the submission set in the future, select a date and time in the calendar.
- To send the submission set now, click **Now**.

c. Click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

5. Click a **Save** button at the top of the layout.

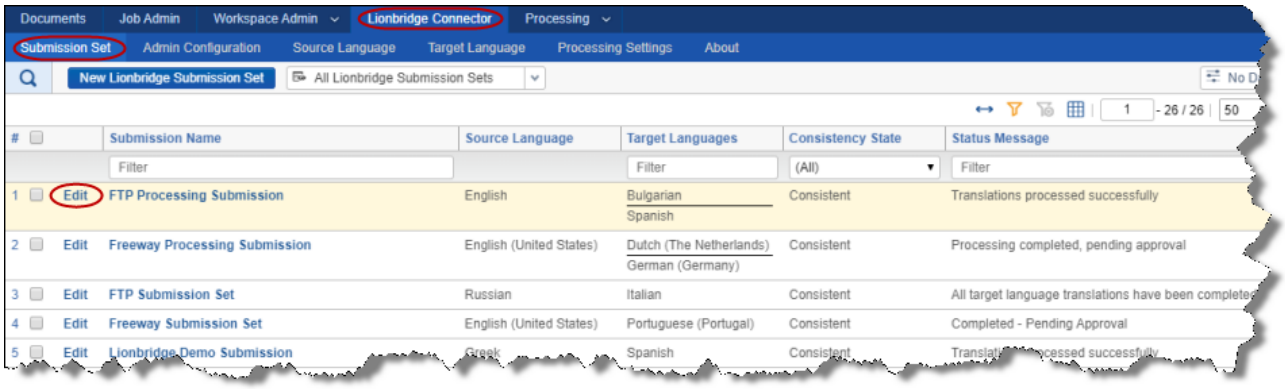
4.2 Immediately Submitting a Submission Set for Translation

From the **Lionbridge Connector** tab, you can immediately submit a previously created submission set to Lionbridge Freeway or to an FTP or SFTP server for translation.

To immediately submit a submission set for translation:

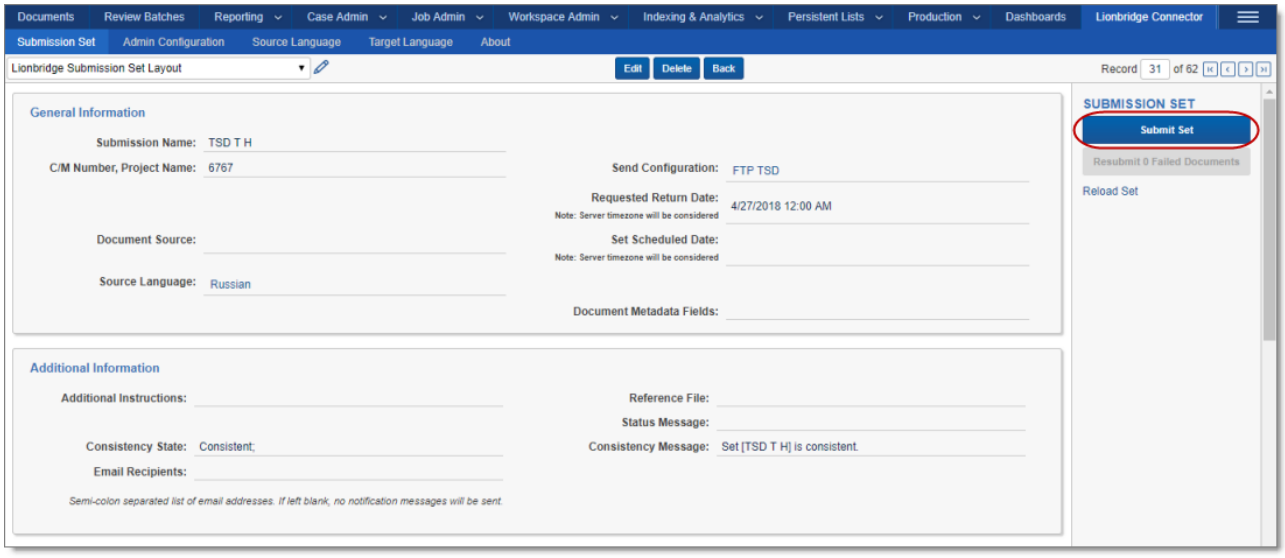
1. Click a workspace where the App is installed.

2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.



3. Click the **Edit** link beside a submission set.

   The **Lionbridge Submission Set Layout** opens.



4. In the top-right corner, click **Submit Set**.

   Important: The **Submit Set** button is displayed only if the submission set has no inconsistencies. If the **Submit Set** button is not displayed, check the **Consistency State** and **Consistency Message** fields for information about inconsistencies. You must resolve the inconsistencies before you can submit the submission set for translation. For descriptions of these fields, see "Editing a Submission Set" on page 29.

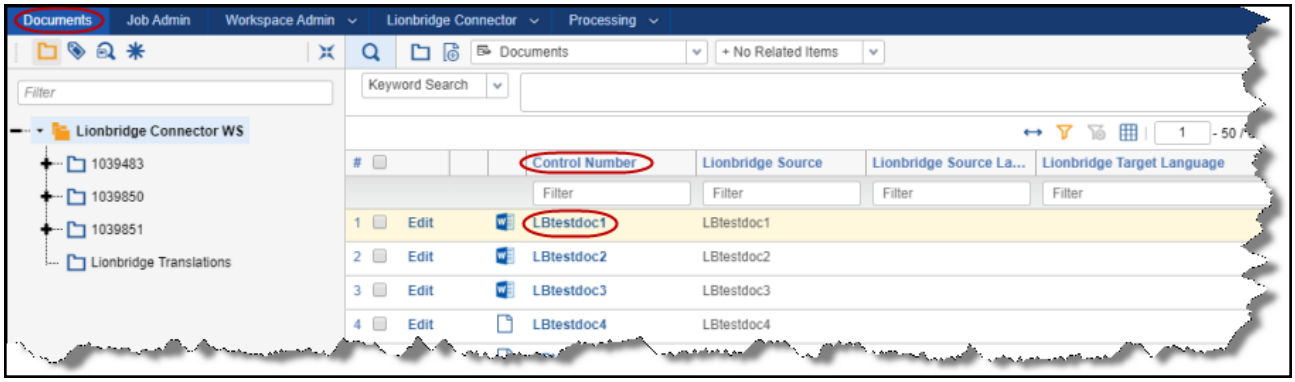
4.3 Immediately Submitting One Document for Translation

You can immediately submit a single document to Lionbridge Freeway or to an FTP or SFTP server for translation from the **Documents** tab. You select the document, specify the translation parameters, and then submit it for translation.

Note: Submitting a document for translation automatically creates a submission set.

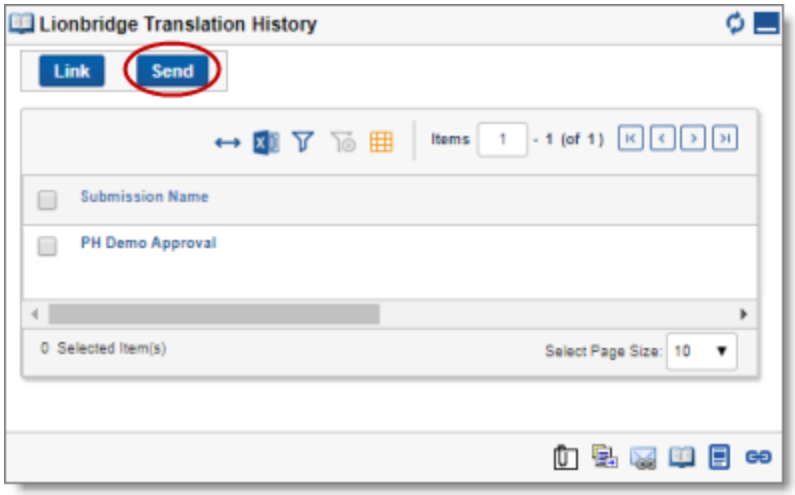
To submit one document for translation:

1. Click a workspace where the App is installed.
2. Click the **Documents** tab to display a list of available documents.



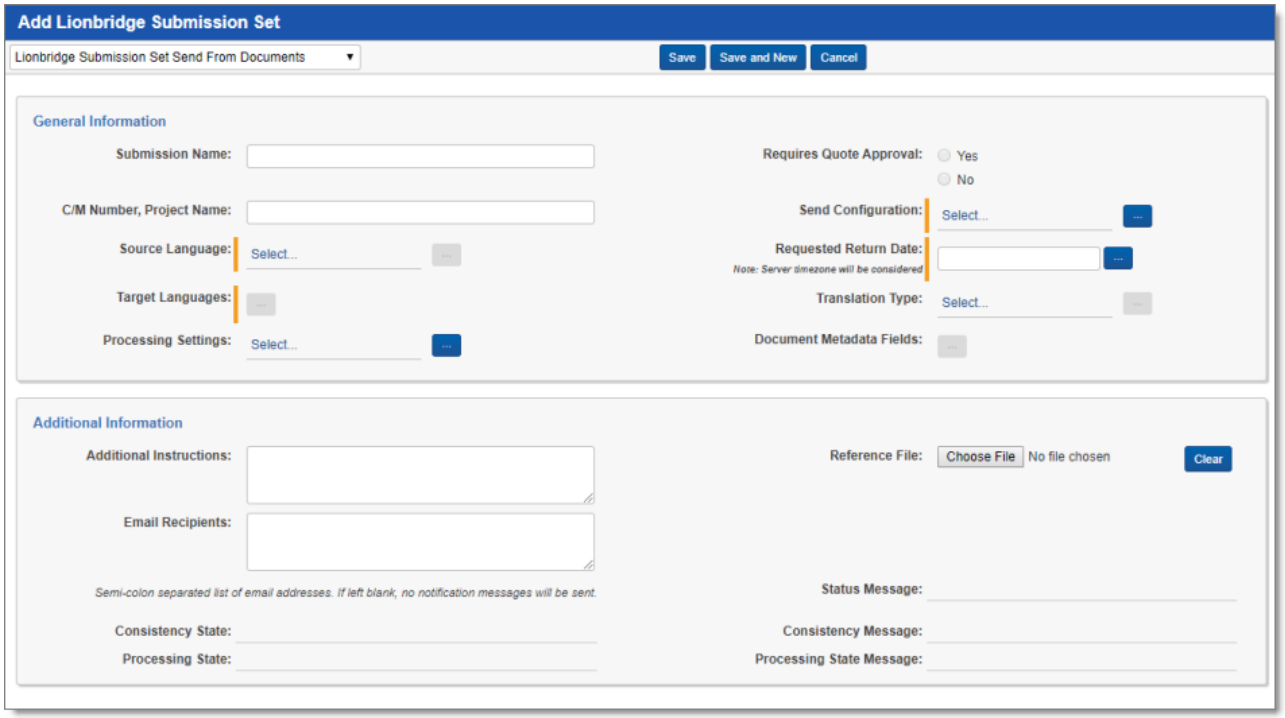
3. In the **Control Number** column, click a document's control number to open it in the viewer.
4. At the bottom of the **Document Metadata** pane, which is on the right side of the document viewer, click the **Lionbridge Translation History** icon .

The **Lionbridge Translation History** pane opens.



5. Click the **Send** button.

The **Add Lionbridge Submission Set** dialog box opens in a new browser window.



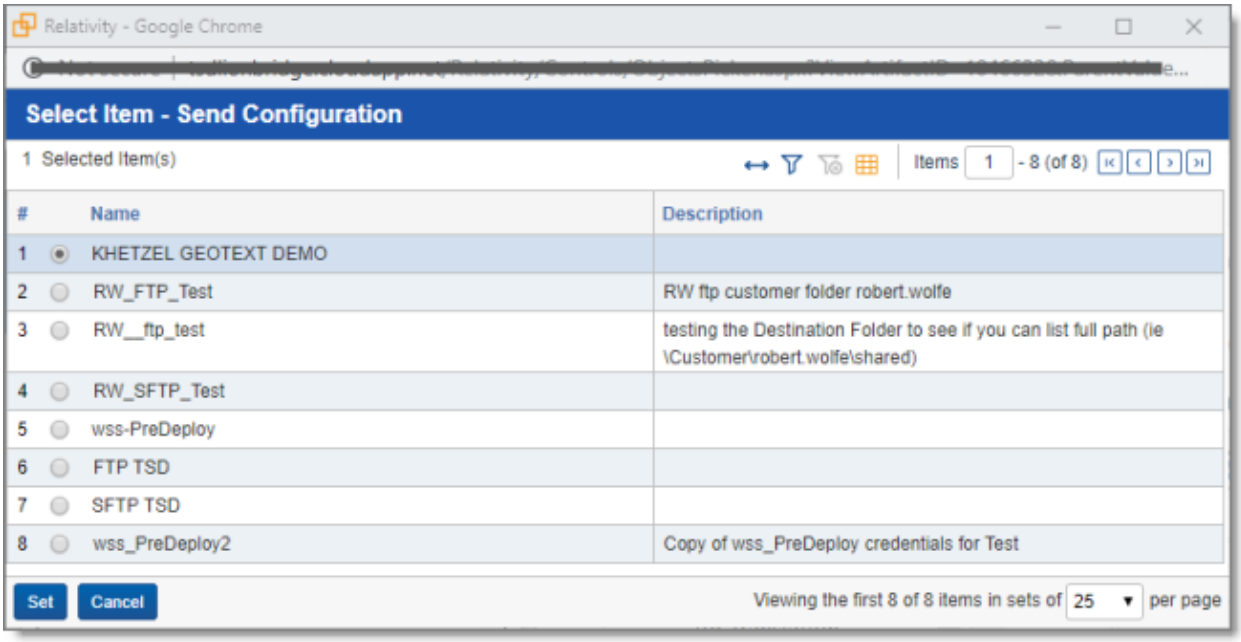
6. Enter the following information in the **General Information** section:

Field	Description
Submission Name	Your name for this submission set.
C/M Number, Project Name	The purchase order (PO) number for this submission set.

7. In **Send Configuration**, you select the translation-provider configuration to use when sending this submission set out for translation. For information about translation-provider configurations, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

   Note: You must select the translation-provider configuration before you can populate the **Source Language**, **Translation Type**, and **Document Metadata Fields** fields or selecting a Requires Quote Approval radio button.

   a. Click the ellipsis button to open the **Select Item - Send Configuration** dialog box in a new browser window.

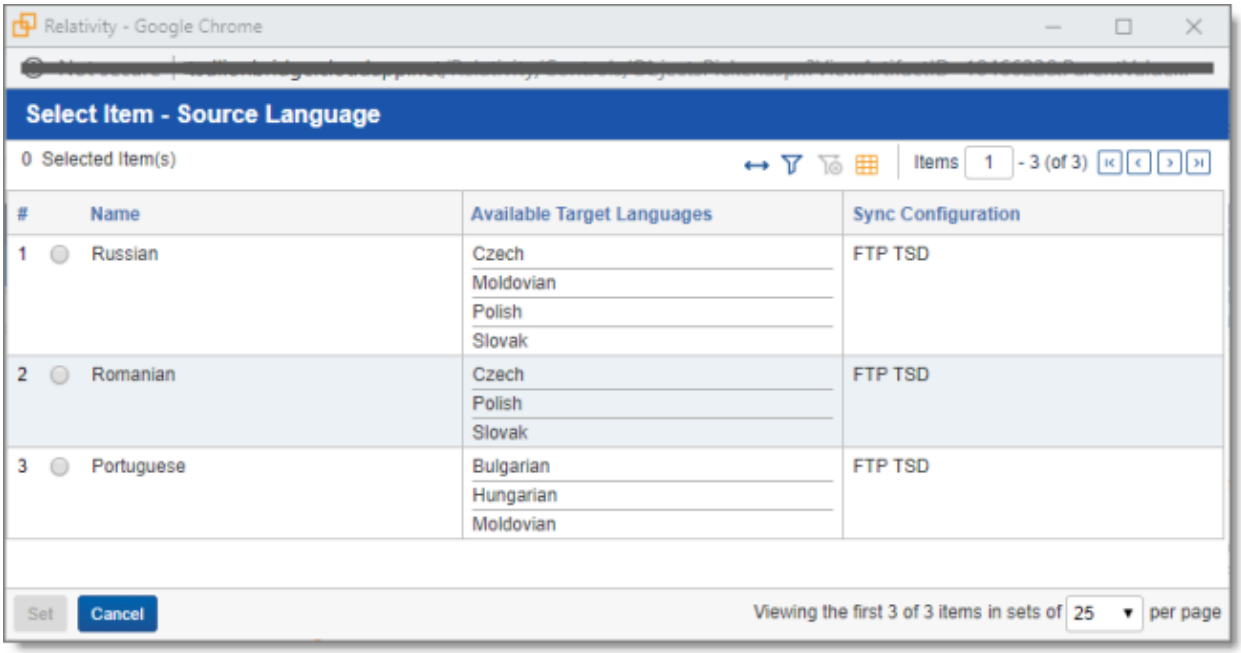


   b. Select the translation-provider configuration and click **Set**.

8. In **Source Language**, select the original language of the documents to send for translation.

   Note: The translation-provider configuration selected above in **Send Configuration** determines the available source languages.

a. Click the ellipsis button ... to open the **Select Item - Source Language** dialog box in a new browser window.

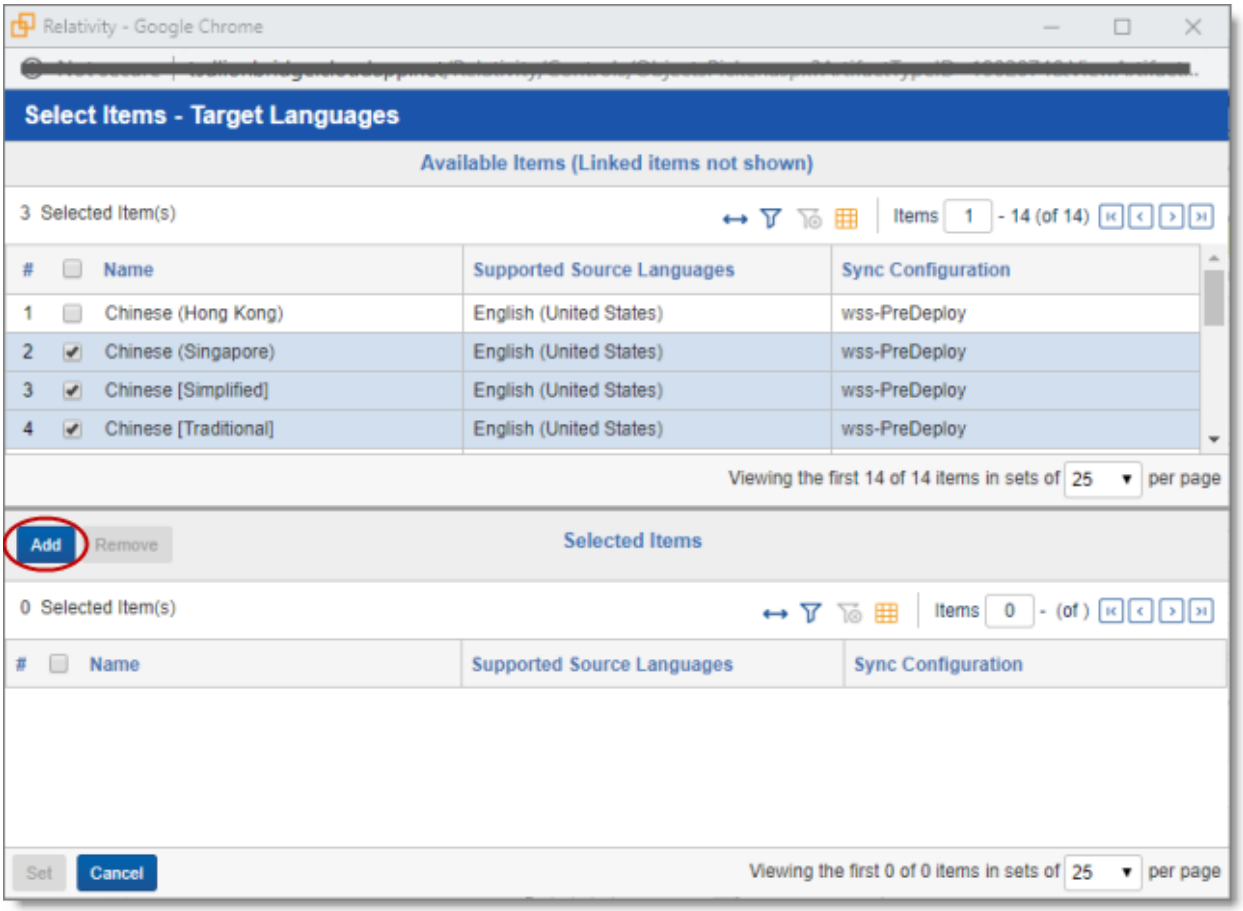


- The **Name** column displays the available source languages.
- The **Available Target Languages** column displays which target languages are available for each source language.
- The **Sync Configuration** column displays the **Send Configuration** (translation provider configuration) for which the source-target language pairs are supported.

b. Select the source language and click **Set**.

9. In **Target Languages**, select the target languages into which to translate this document.

a. Click the ellipsis button [...] to open the **Select Items - Target Languages** dialog box in a new browser window.



b. In the top part of the dialog box, select the check boxes for the target languages to configure for this source language, and click **Add**.

Note: The **Add** button is available only after selecting at least one check box.

The selected target languages are now displayed at the bottom of the dialog box.

c. Click **Set** to save your change and close this dialog box.

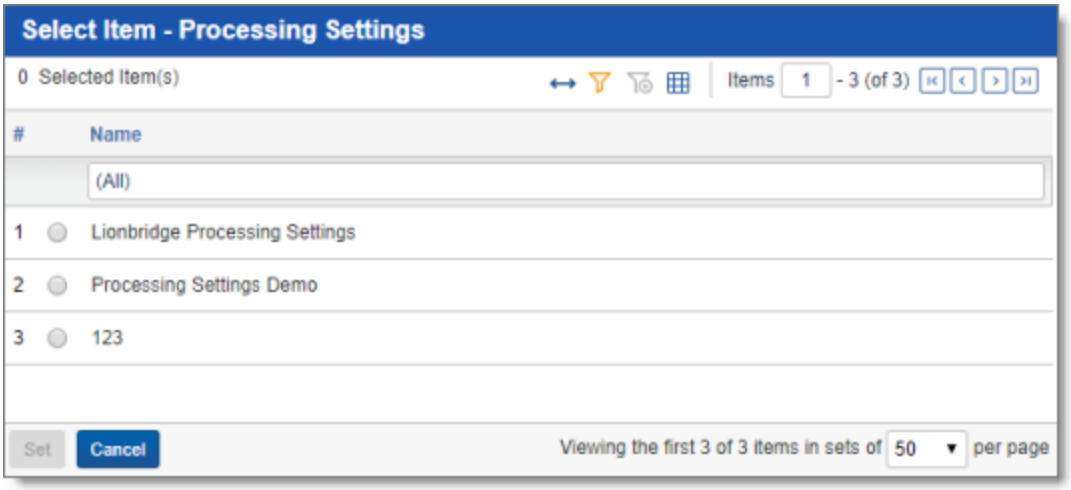
Note: The **Set** button is available only after clicking **Add** in the previous sub-step.

The **Add Lionbridge Submission Set Layout** dialog box updates.

10. Available only if processing settings were configured. In **Processing Settings**, select the processing settings to use. Selecting a set of processing settings enables you to view all translations, in supported document types, within the translation viewer and access your translated documents in the **Documents** tab. These settings include the processing profile, destination folder, and time zone. For more

information about processing settings, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

a. Click the ellipsis button ... to open the **Select Item - Processing Settings** dialog box in a new browser window.

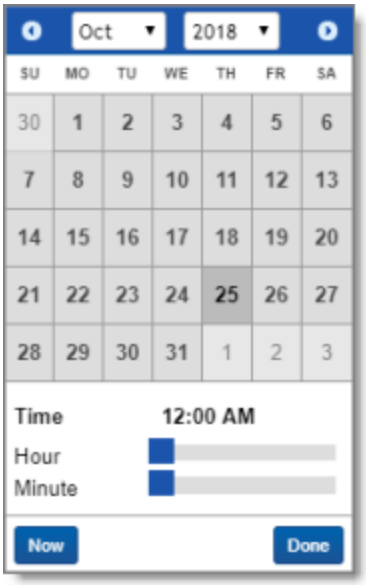


The **Name** column displays the configured processing settings.

b. Select the processing settings and click **Set**.

11. Available and required only if your translation provider is Lionbridge Freeway, which is determined by the translation-provider configuration you selected in **Send Configuration** described above. You use the **Requires Quote Approval** option to inform the translation provider whether you want to receive a quote before the translation process starts.
    - To request a quote, click **Yes**.
    - If you do not want to request a quote, click **No**.
12. Required. You use **Requested Return Date** to select a deadline for completing the translation.

a. Click the ellipsis button ... to open the **date and time selector**.

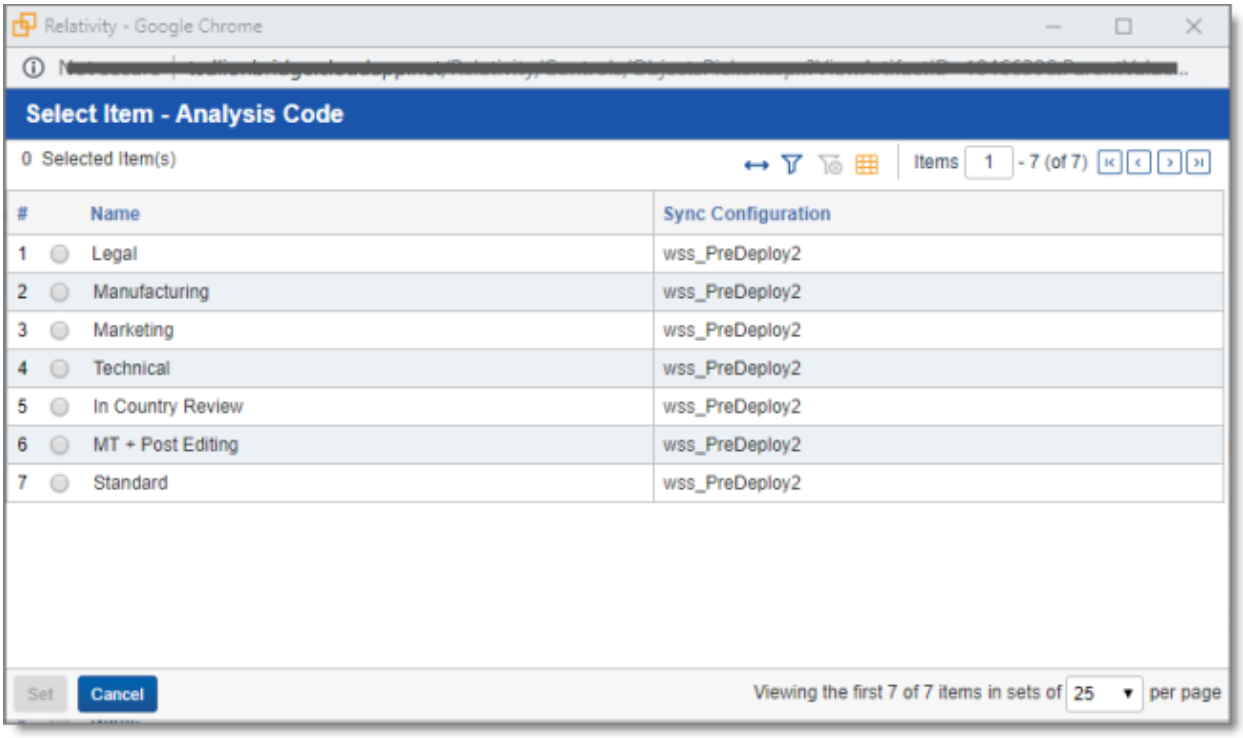


b. Select a date and time in the calendar, and click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

13. Available and required only if your translation provider is Lionbridge Freeway, which is determined by the translation-provider configuration you selected in **Send Configuration**, described above. You use the **Translation Type** option to specify a Freeway analysis code for this submission set.

a. Click the ellipsis button to open the **Select Item - Analysis Code** dialog box in a new browser window.

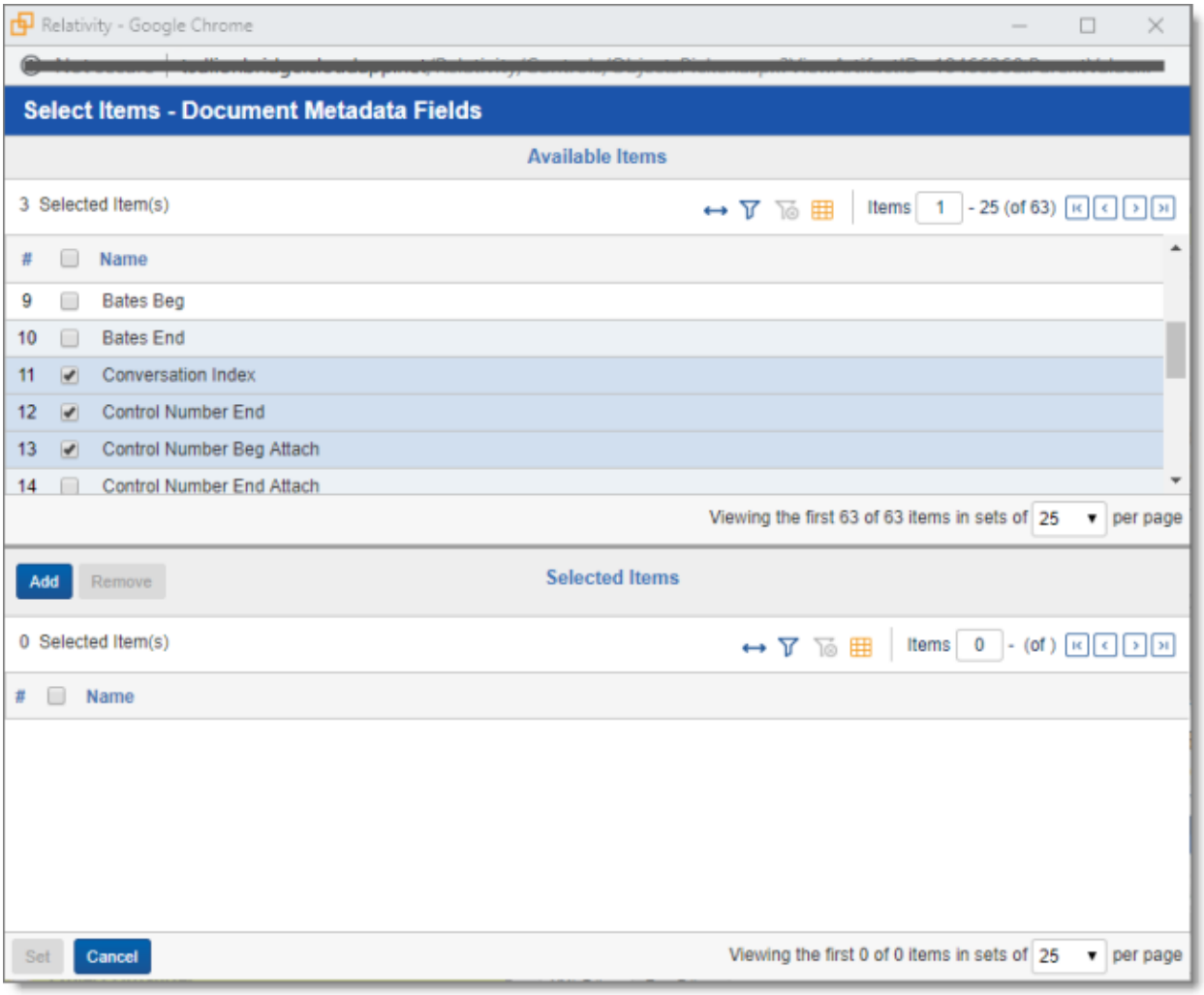


b. Select the Freeway analysis code for this submission set and click **Set**.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for Lionbridge Freeway.

14. Available only if your translation-provider configuration is for FTP or SFTP, which you selected in **Send Configuration**, described above. You can use the **Document Metadata Fields** feature to specify which fields in the documents in this submission set are metadata. These fields are included in a `.txt` file that is delivered to the FTP or SFTP server.

a. Click the ellipsis button [...] to open the **Select Item - Document Metadata Fields** dialog box in a new browser window.



b. In the top part of the dialog box, select the check boxes of the metadata fields in the documents in this submission set and click **Add**.

Note: The **Add** button is available only when at least one metadata field is selected.

The selected metadata fields are now displayed at the bottom of the dialog box.

c. In the bottom part of the dialog box, click **Set** to save your change and close this dialog box.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for FTP or SFTP.

15. Enter the following information in the **Additional Information** section:

Field	Description
Additional Instructions	Enter any requests, additional information, or guidance for the translator.
Consistency State	This read-only field is populated after the submission set is created.
Email Recipients	Enter the email addresses of the recipients of notifications about this submission set. Separate multiple email addresses with a semi-colon (`;`). The recipients will receive email notifications about translation-status events, for example, when the submission set has been delivered to Lionbridge Freeway or to the FTP or SFTP site. For more information, see "Receiving Email Notifications" on page 83.
Reference File	You can send reference files (support assets) to your translation provider as part of a submission set. This provides helpful context for the translator. ▸ Click **Choose File**. Then navigate to the reference file and select it to upload it and add it to the submission set.
Status Message	This read-only field is populated after the submission set is submitted for translation.
Consistency Message	This read-only field is populated after the submission set is created.
Project ID	This read-only field is populated after the submission set is submitted for translation to Lionbridge Freeway. It is displayed only if the translation-provider configuration selected in **Send Configuration**, above, is for Lionbridge Freeway.

16. Click **Save**.

    The App submits the document for translation.

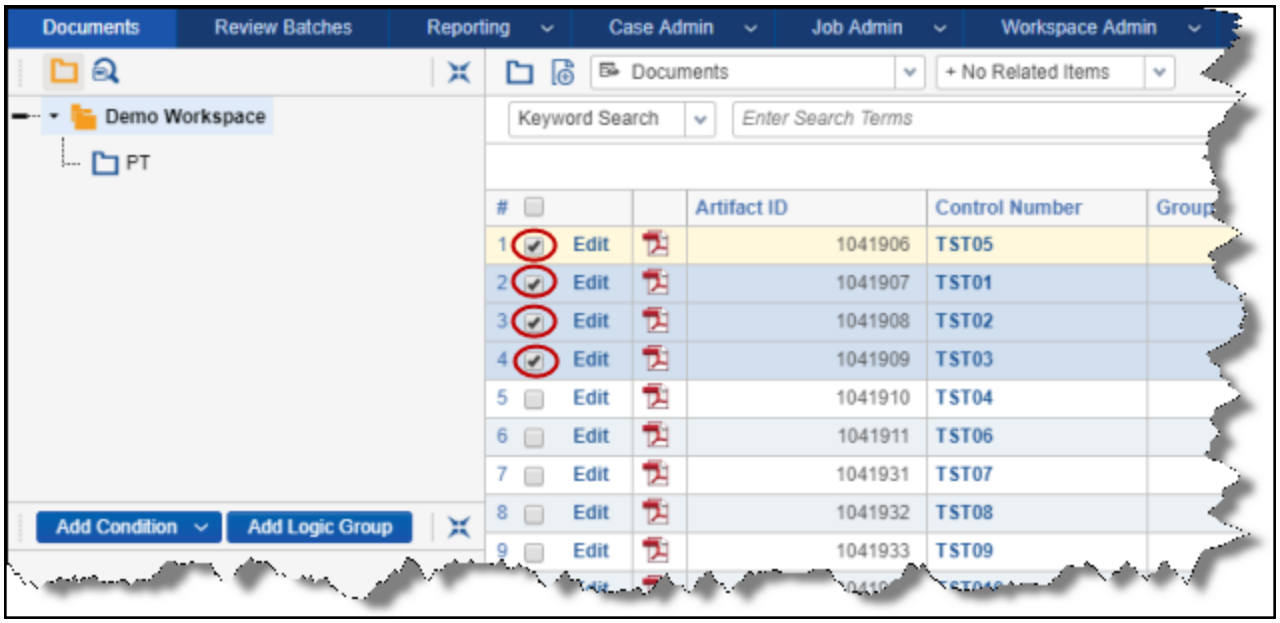
4.4 Immediately Submitting Multiple Documents to Freeway for Translation

You can immediately submit multiple documents to Lionbridge Freeway for translation from the **Documents** tab. You select the documents, specify the translation parameters, and then submit them to Freeway.

Note: Submitting multiple documents for translation automatically creates a submission set.

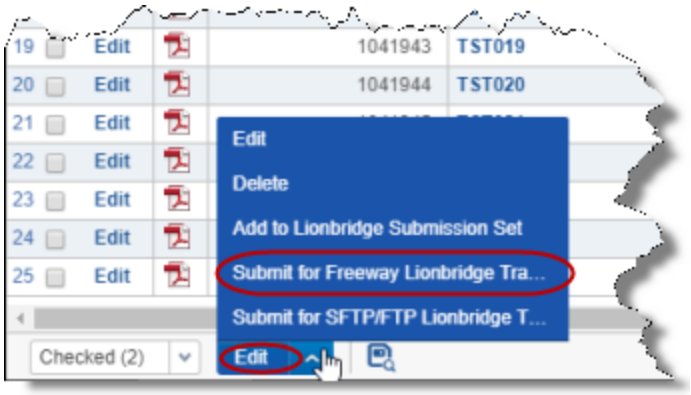
To immediately submitting multiple documents to Freeway for translation:

1. Click a workspace where the App is installed.
2. Click the **Documents** tab to display a list of available documents.

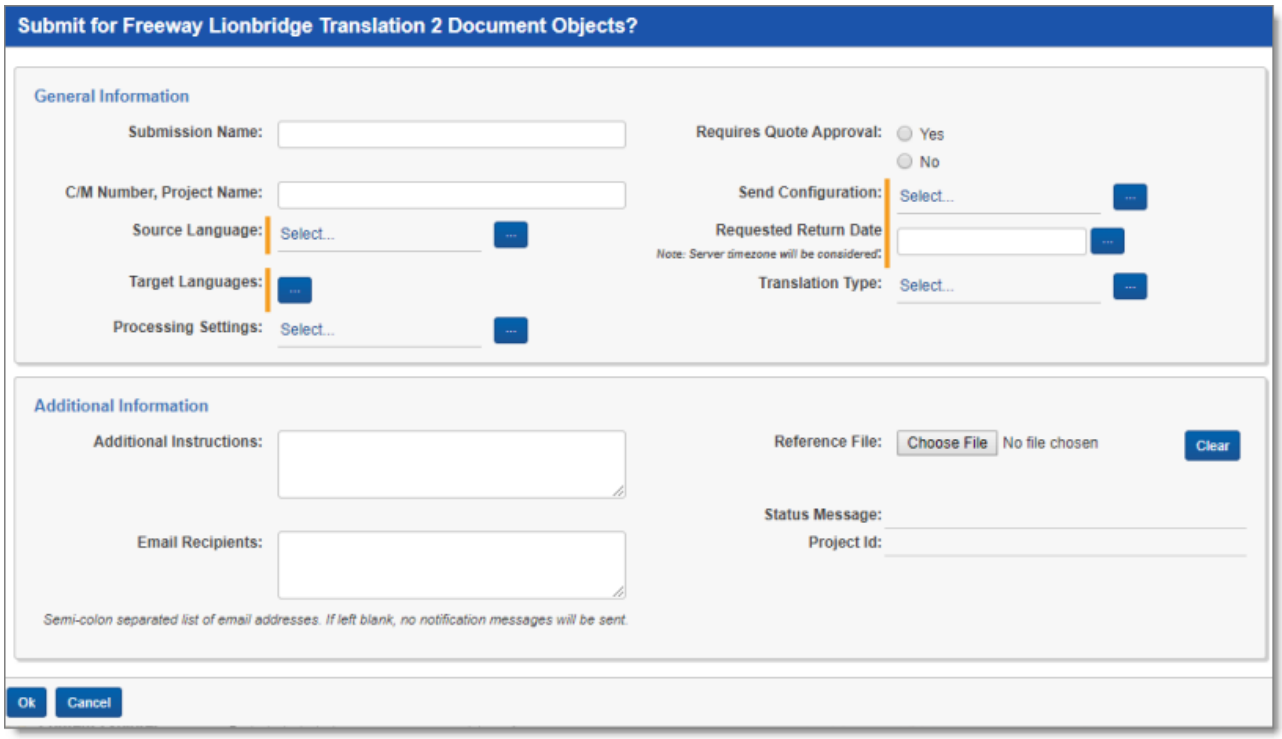


3. Select the check boxes next to the documents to submit for translation.

4. At the bottom of the tab, click the **Edit** menu and then click **Submit for Freeway Lionbridge Translation**.



The **Submit for Freeway Lionbridge Translation Document Objects** dialog box opens in a new browser window.



Note: The number in the title indicates how many documents you selected to send out for translation.

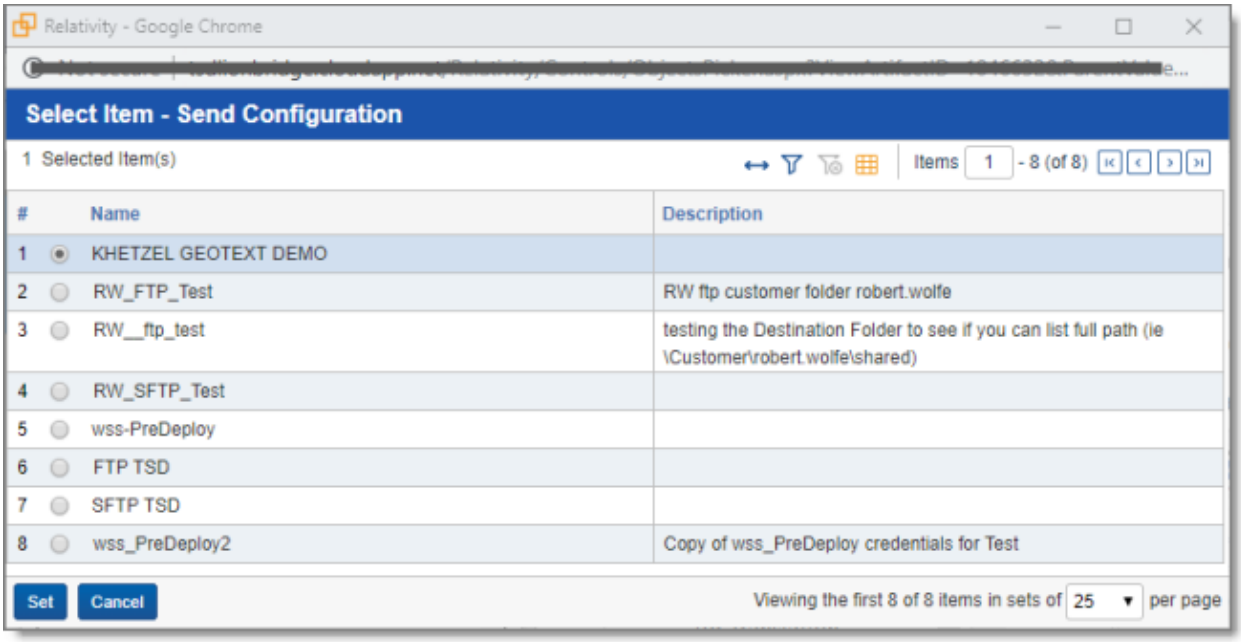
5. Enter the following information in the **General Information** section:

Field	Description
Submission Name	Your name for this submission set.
C/M Number, Project Name	The purchase order (PO) number for this submission set.

6. In **Send Configuration**, you select the translation-provider configuration to use when sending this submission set out for translation. For information about translation-provider configurations, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

   Note: You must select the translation-provider configuration before you can populate the **Source Language**, **Translation Type**, and **Document Metadata Fields** fields or selecting a Requires Quote Approval radio button.

   a. Click the ellipsis button to open the **Select Item - Send Configuration** dialog box in a new browser window.

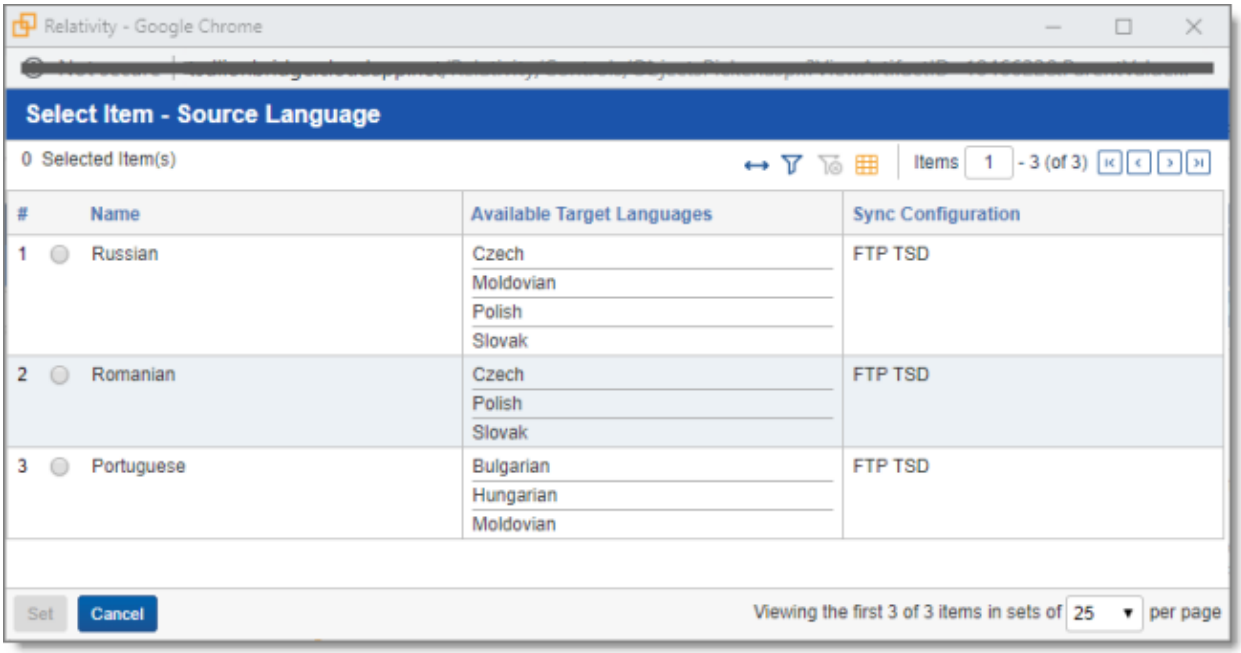


   b. Select the translation-provider configuration and click **Set**.

7. In **Source Language**, select the original language of the documents to send for translation.

   Note: The translation-provider configuration selected above in **Send Configuration** determines the available source languages.

a. Click the ellipsis button [...] to open the **Select Item - Source Language** dialog box in a new browser window.

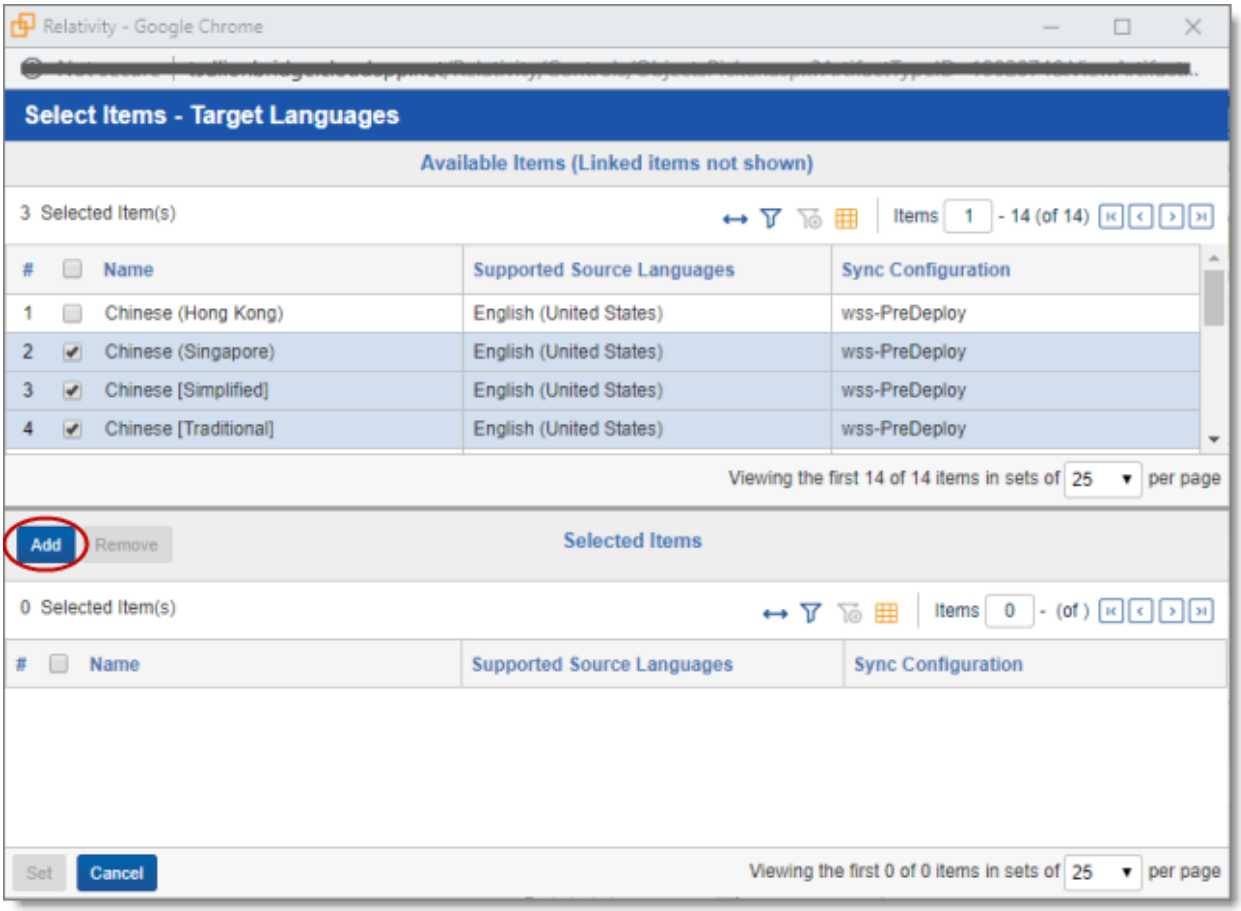


- The **Name** column displays the available source languages.
- The **Available Target Languages** column displays which target languages are available for each source language.
- The **Sync Configuration** column displays the **Send Configuration** (translation provider configuration) for which the source-target language pairs are supported.

b. Select the source language and click **Set**.

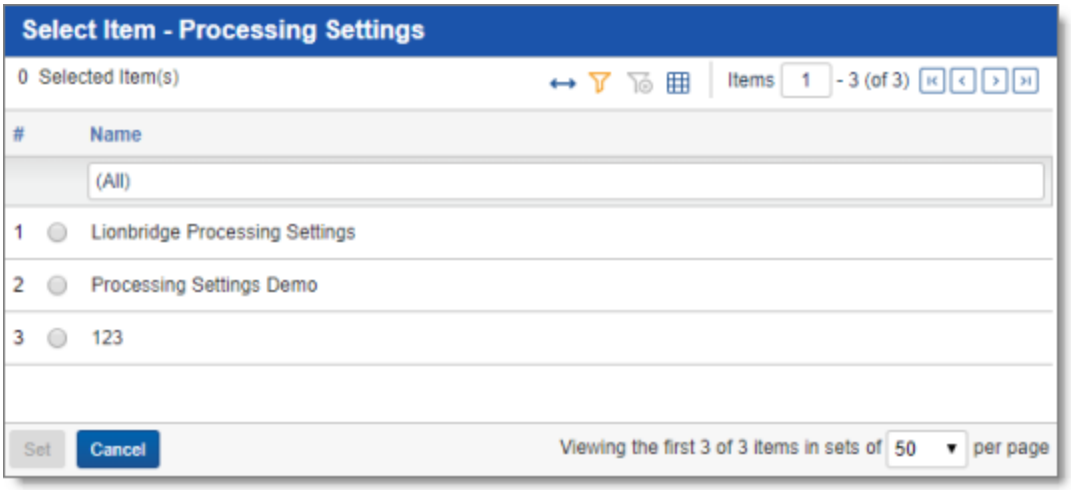
8. In **Target Languages**, select the target languages into which to translate this document.

a. Click the ellipsis button ... to open the **Select Items - Target Languages** dialog box in a new browser window.



9. Available only if processing settings were configured. In **Processing Settings**, select the processing settings to use. Selecting a set of processing settings enables you to view all translations, in supported document types, within the translation viewer and access your translated documents in the **Documents** tab. These settings include the processing profile, destination folder, and time zone. For more information about processing settings, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

a. Click the ellipsis button ... to open the **Select Item - Processing Settings** dialog box in a new browser window.

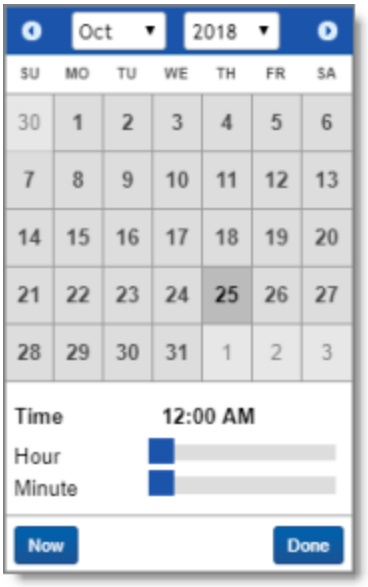


The **Name** column displays the configured processing settings.

b. Select the processing settings and click **Set**.

10. You use the **Requires Quote Approval** option to inform the translation provider whether you want to receive a quote before the translation process starts.
    - To request a quote, click **Yes**.
    - If you do not want to request a quote, click **No**.
11. Required. You use **Requested Return Date** to select a deadline for completing the translation.

a. Click the ellipsis button to open the **date and time selector**.

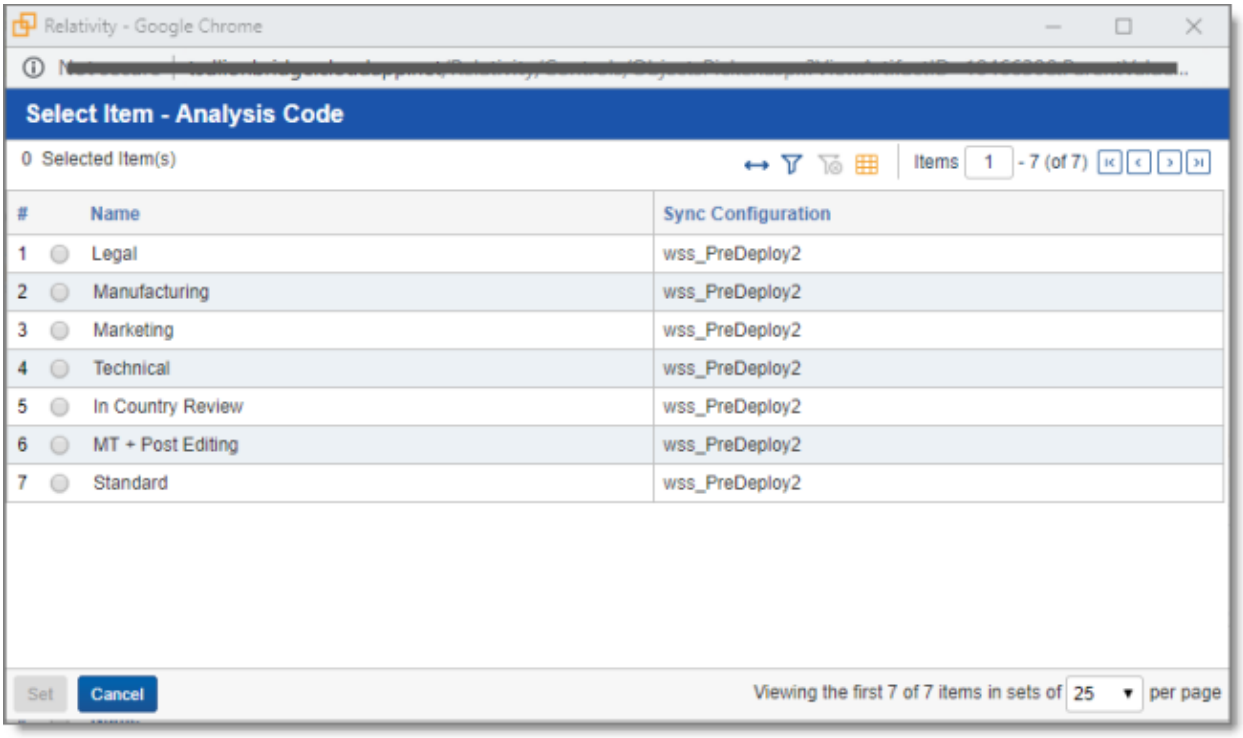


b. Select a date and time in the calendar, and click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

12. You use the **Translation Type** option to specify a Freeway analysis code for this submission set.

a. Click the ellipsis button to open the **Select Item - Analysis Code** dialog box in a new browser window.



b. Select the Freeway analysis code for this submission set and click **Set**.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for Lionbridge Freeway.

13. Enter the following information in the **Additional Information** section:

Field	Description
Additional Instructions	Enter any requests, additional information, or guidance for the translator.
Consistency State	This read-only field is populated after the submission set is created.
Email Recipients	Enter the email addresses of the recipients of notifications about this submission set. Separate multiple email addresses with a semi-colon (;). The recipients will receive email notifications about translation-status events, for example, when the submission set has been delivered to Lionbridge Freeway or to the FTP or SFTP site. For more information, see "Receiving Email Notifications" on page 83.
Reference File	You can send reference files (support assets) to your translation provider as part of a submission set. This provides helpful context for the translator. ▸ Click **Choose File**. Then navigate to the reference file and select it to upload it and add it to the submission set.
Status Message	This read-only field is populated after the submission set is submitted for translation.
Consistency Message	This read-only field is populated after the submission set is created.
Project ID	This read-only field is populated after the submission set is submitted for translation to Lionbridge Freeway. It is displayed only if the translation-provider configuration selected in **Send Configuration**, above, is for Lionbridge Freeway.

14. Click **OK**.

    The App submits the documents for translation to Lionbridge Freeway.

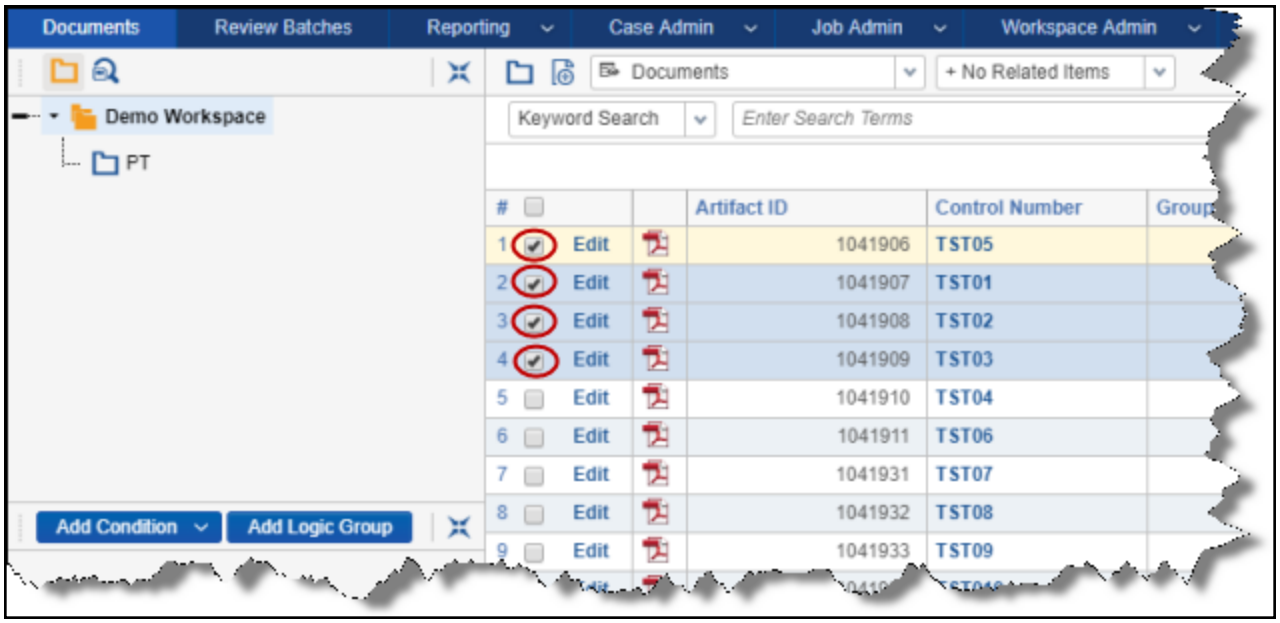
4.5 Immediately Submitting Multiple Documents to an FTP or SFTP Server for Translation

You can immediately submit multiple documents to an FTP or SFTP server for translation from the **Documents** tab. You select the documents, specify the translation parameters, and then submit them to the server.

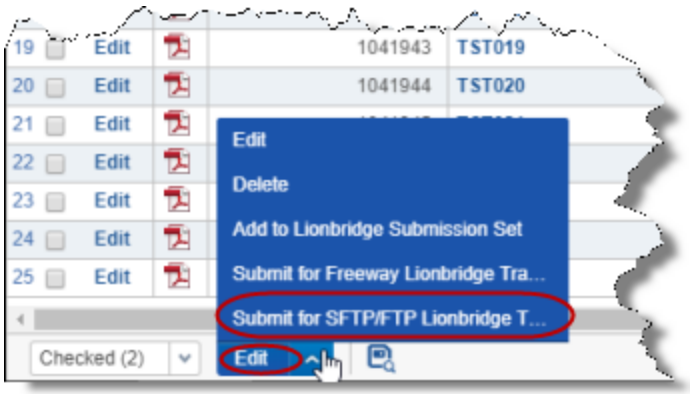
Note: Submitting multiple documents for translation automatically creates a submission set.

To immediately submitting multiple documents to an FTP or SFTP Server for translation:

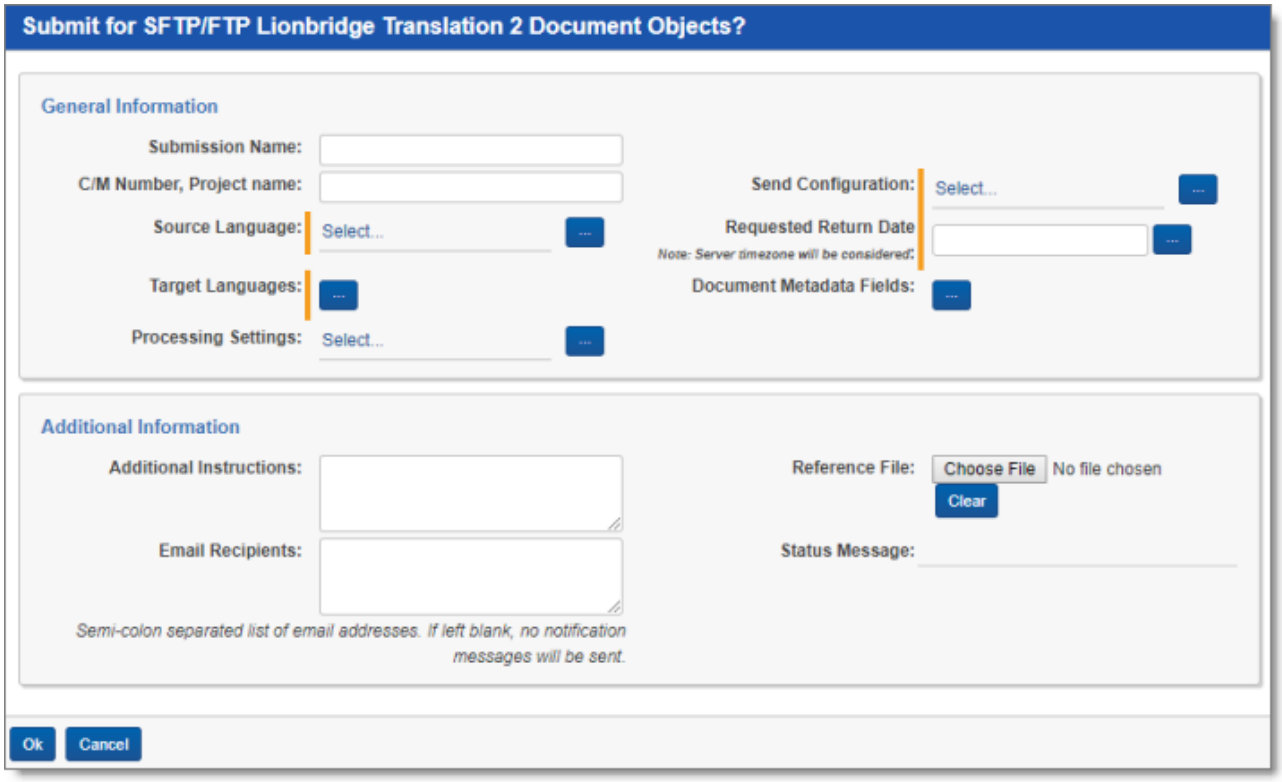
1. Click a workspace where the App is installed.
2. Click the **Documents** tab to display a list of available documents.



3. Select the check boxes next to the documents to submit for translation.
4. At the bottom of the tab, click the **Edit** menu and then click **Submit for SFTP/FTP Lionbridge Translation**.



The **Submit for SFTP/FTP Lionbridge Translation Document Objects** dialog box opens in a new browser window.



Note: The number in the title indicates how many documents you selected to send out for translation.

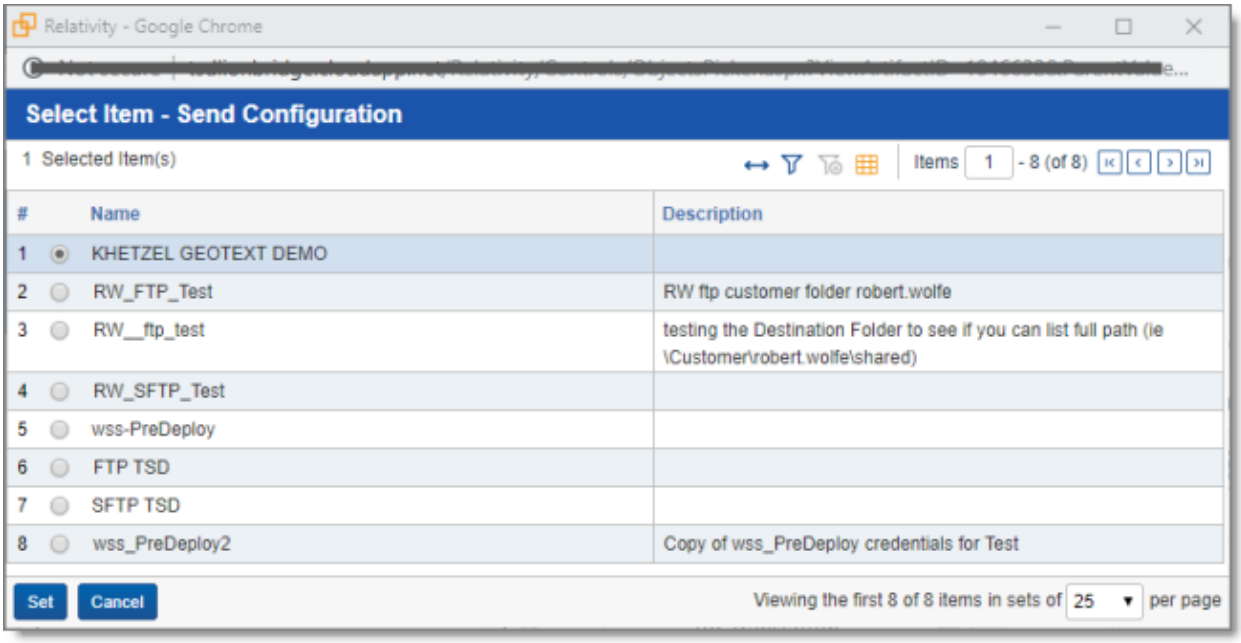
5. Enter the following information in the **General Information** section:

Field	Description
Submission Name	Your name for this submission set.
C/M Number, Project Name	The purchase order (PO) number for this submission set.

6. In **Send Configuration**, you select the translation-provider configuration to use when sending this submission set out for translation. For information about translation-provider configurations, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

Note: You must select the translation-provider configuration before you can populate the **Source Language**, **Translation Type**, and **Document Metadata Fields** fields or selecting a Requires Quote Approval radio button.

a. Click the ellipsis button [...] to open the **Select Item - Send Configuration** dialog box in a new browser window.

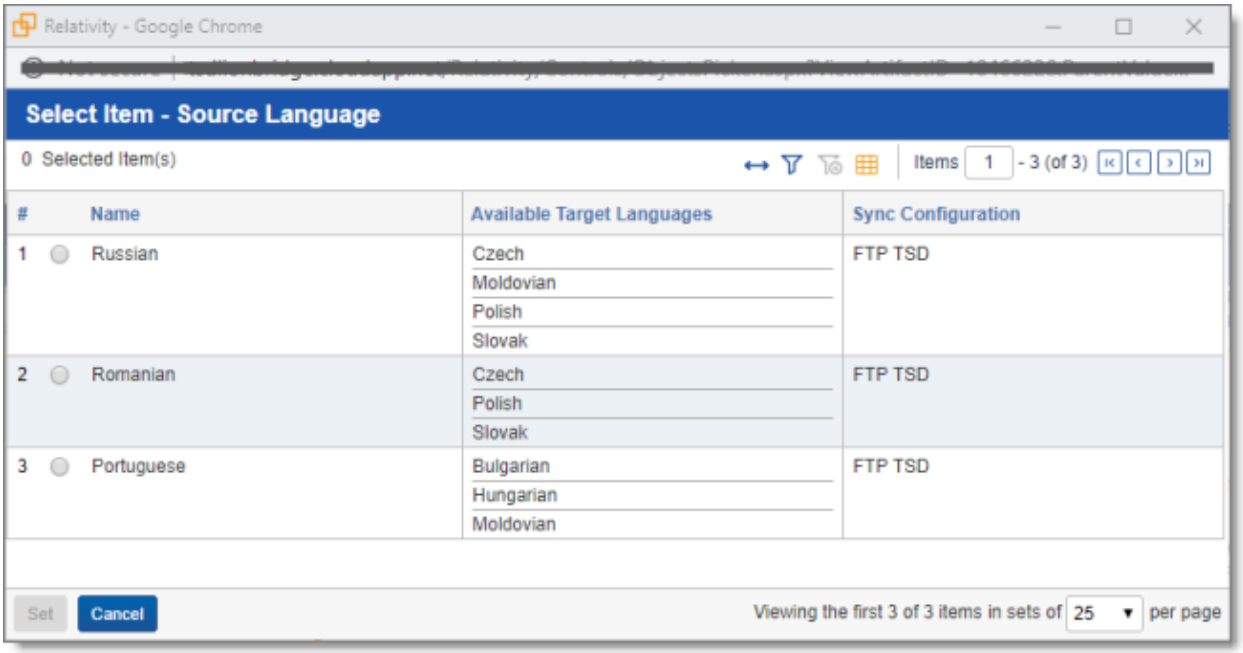


b. Select the translation-provider configuration and click **Set**.

7. In **Source Language**, select the original language of the documents to send for translation.

Note: The translation-provider configuration selected above in **Send Configuration** determines the available source languages.

a. Click the ellipsis button to open the **Select Item - Source Language** dialog box in a new browser window.

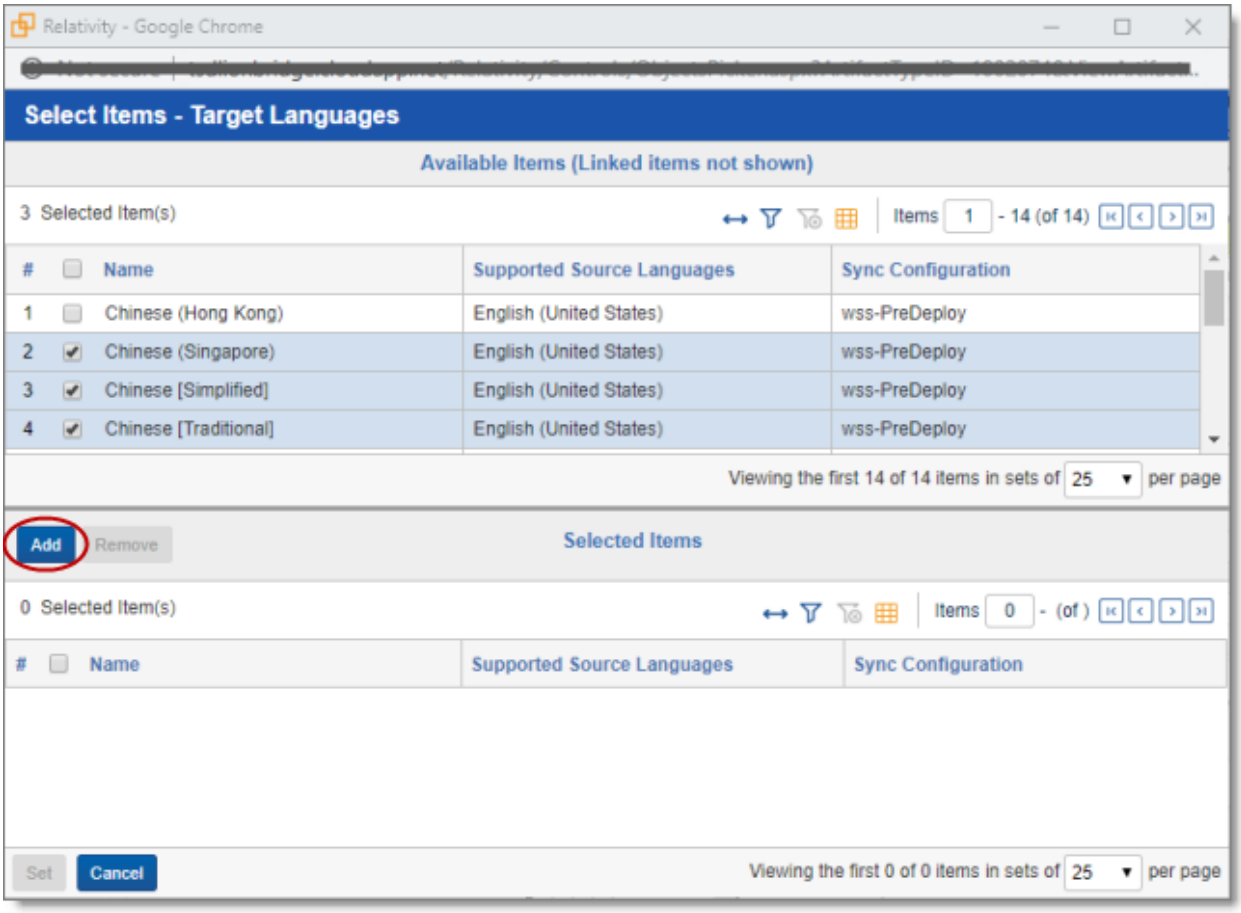


- The **Name** column displays the available source languages.
- The **Available Target Languages** column displays which target languages are available for each source language.
- The **Sync Configuration** column displays the **Send Configuration** (translation provider configuration) for which the source-target language pairs are supported.

b. Select the source language and click **Set**.

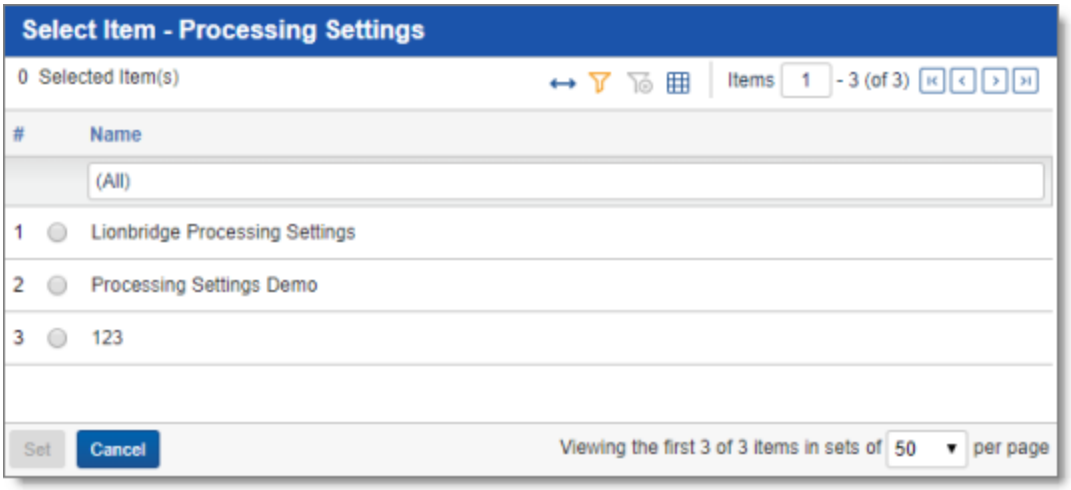
8. In **Target Languages**, select the target languages into which to translate this document.

a. Click the ellipsis button [...] to open the **Select Items - Target Languages** dialog box in a new browser window.



9. Available only if processing settings were configured. In **Processing Settings**, select the processing settings to use. Selecting a set of processing settings enables you to view all translations, in supported document types, within the translation viewer and access your translated documents in the **Documents** tab. These settings include the processing profile, destination folder, and time zone. For more information about processing settings, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

a. Click the ellipsis button ... to open the **Select Item - Processing Settings** dialog box in a new browser window.

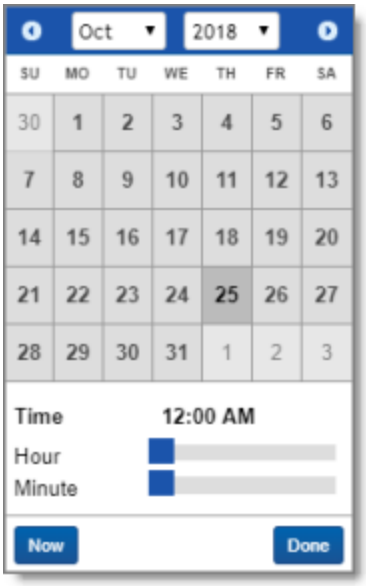


The **Name** column displays the configured processing settings.

b. Select the processing settings and click **Set**.

10. Required. You use **Requested Return Date** to select a deadline for completing the translation.

a. Click the ellipsis button ... to open the **date and time selector**.

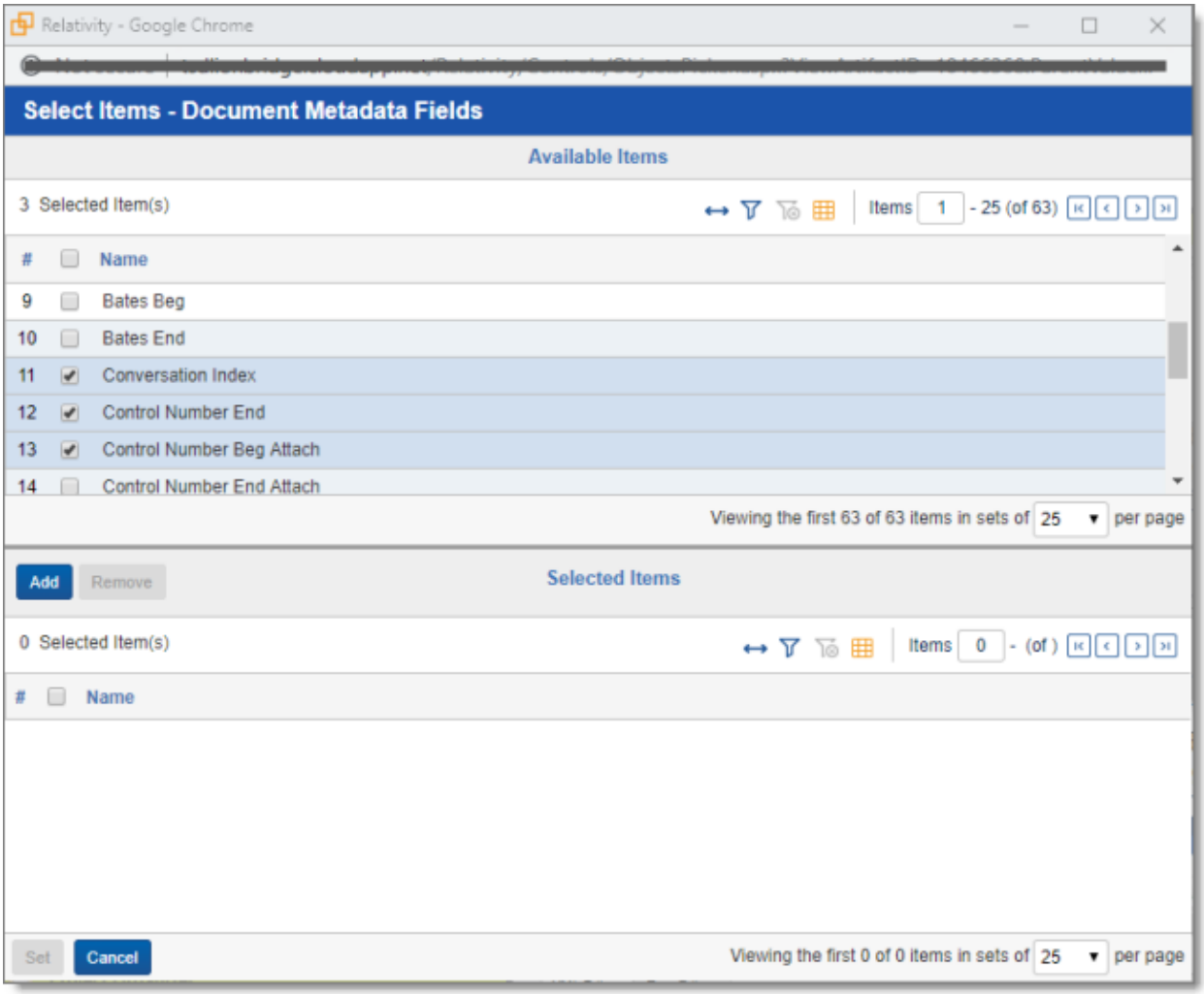


b. Select a date and time in the calendar, and click **Done**.

Note: The date/time format and timezone are determined by the server where Relativity is installed.

11. You can use the **Document Metadata Fields** feature to specify which fields in the documents in this submission set are metadata.

    a. Click the ellipsis button ... to open the **Select Item - Document Metadata Fields** dialog box in a new browser window.



    b. In the top part of the dialog box, select the check boxes of the metadata fields in the documents in this submission set and click **Add**.

    Note: The **Add** button is available only when at least one metadata field is selected.

    The selected metadata fields are now displayed at the bottom of the dialog box.

    c. In the bottom part of the dialog box, click **Set** to save your change and close this dialog box.

Note: This option is displayed only if the translation-provider configuration you selected in **Send Configuration**, above is for FTP or SFTP.

12. Enter the following information in the **Additional Information** section:

Field	Description
Additional Instructions	Enter any requests, additional information, or guidance for the translator.
Consistency State	This read-only field is populated after the submission set is created.
Email Recipients	Enter the email addresses of the recipients of notifications about this submission set. Separate multiple email addresses with a semi-colon (;). The recipients will receive email notifications about translation-status events, for example, when the submission set has been delivered to Lionbridge Freeway or to the FTP or SFTP site. For more information, see "Receiving Email Notifications" on page 83.
Reference File	You can send reference files (support assets) to your translation provider as part of a submission set. This provides helpful context for the translator. ▸ Click **Choose File**. Then navigate to the reference file and select it to upload it and add it to the submission set.
Status Message	This read-only field is populated after the submission set is submitted for translation.
Consistency Message	This read-only field is populated after the submission set is created.
Project ID	This read-only field is populated after the submission set is submitted for translation to Lionbridge Freeway. It is displayed only if the translation-provider configuration selected in **Send Configuration**, above, is for Lionbridge Freeway.

13. Click **OK**.

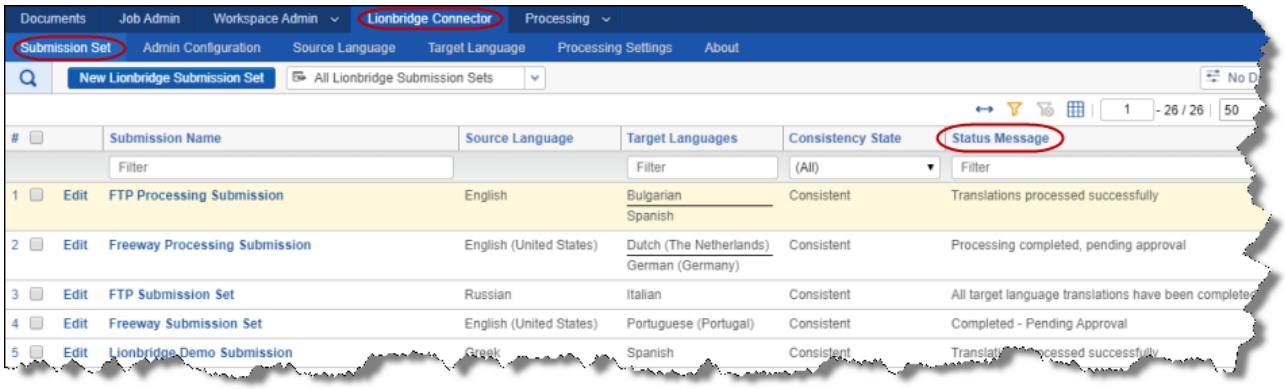
The App submits the documents for translation to the designated SFTP or FTP server specified in the translation-provider configuration, described above.

4.6 Resubmitting a Submission Set to an FTP or SFTP Server

If an unexpected error occurs while submitting a submission set to an FTP or SFTP server, you can resubmit the documents that were not submitted properly.

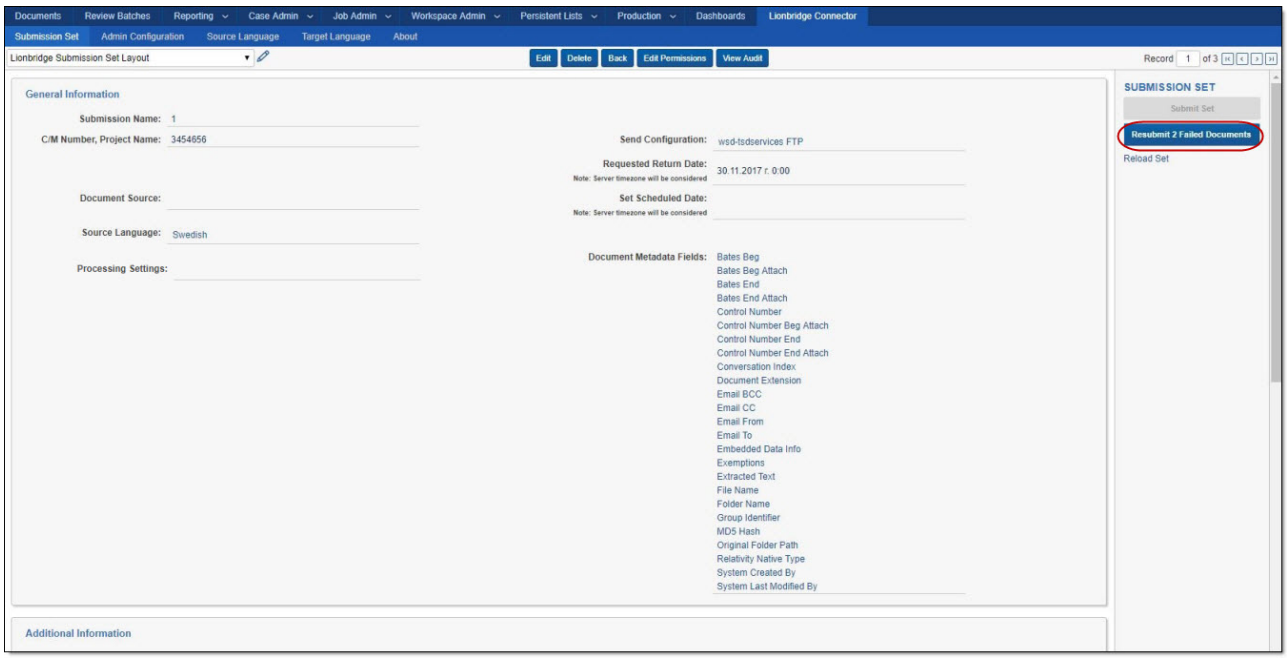
To resubmit a submission set to an FTP or SFTP server after an unexpected error occurs:

1. Click a workspace where the App is installed.
2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.



3. Click the link beside a submission set for which the **Status Message** column displays `In Translation with Errors`.

The **Lionbridge Submission Set Layout** opens.



The App continues resubmitting the submission set from the point of failure.

5 Monitoring Translation Status and Viewing Translation History

5 Monitoring Translation Status and Viewing Translation History

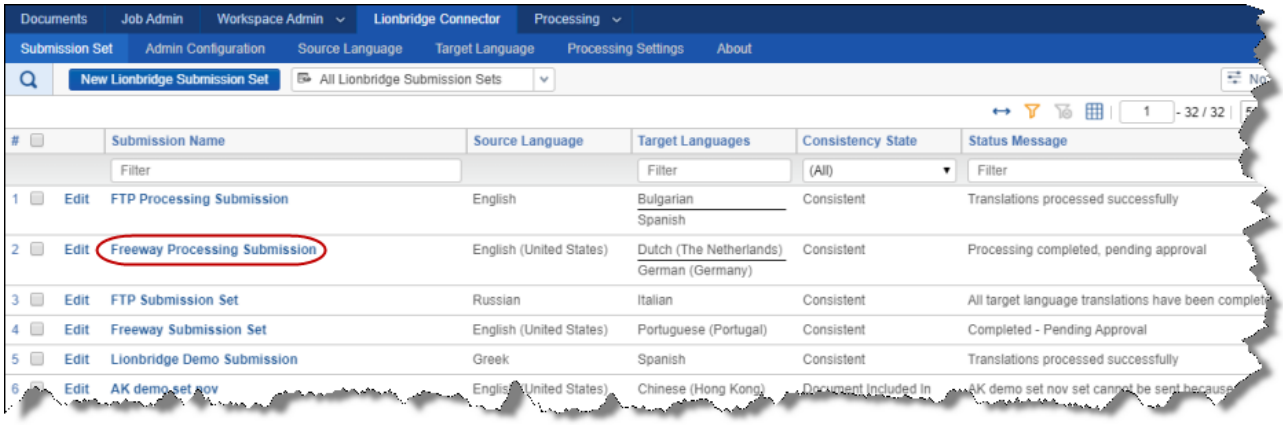
After submitting a submission set for translation, you can view its translation status and translation history.

You may also receiving email notifications when there are changes to the translation status of the submission set. For details, see "Receiving Email Notifications" on page 83.

For a list and description of all translation statuses, see "Translation Statuses" on page 82.

To monitor a translation status of a submission set and view its translation history:

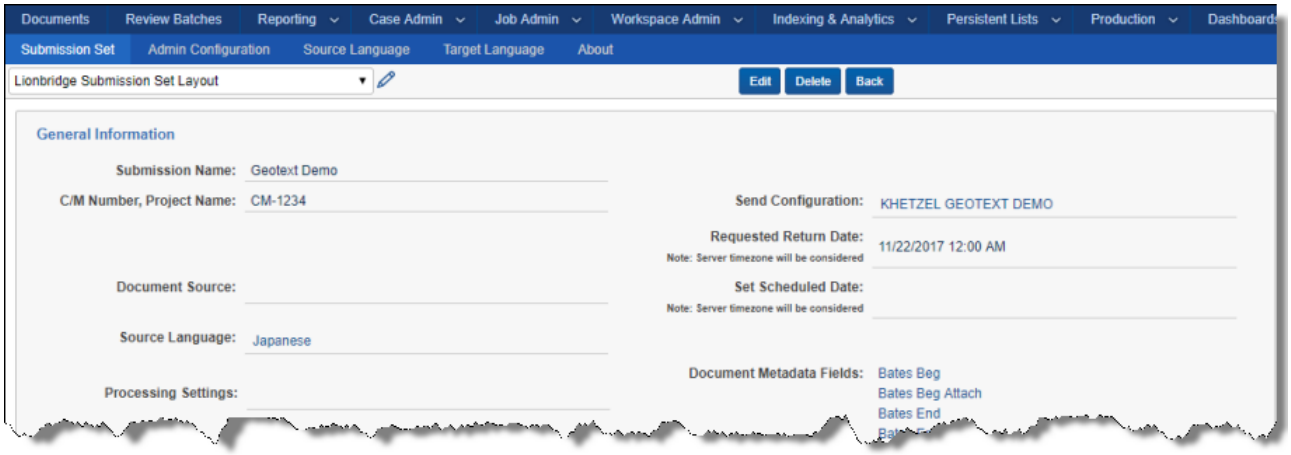
1. Click a workspace where the App is installed.
2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.



3. Click the link for a submission set in the **Submission Name** column.

5 Monitoring Translation Status and Viewing Translation History

The **Lionbridge Submission Set Layout** opens.



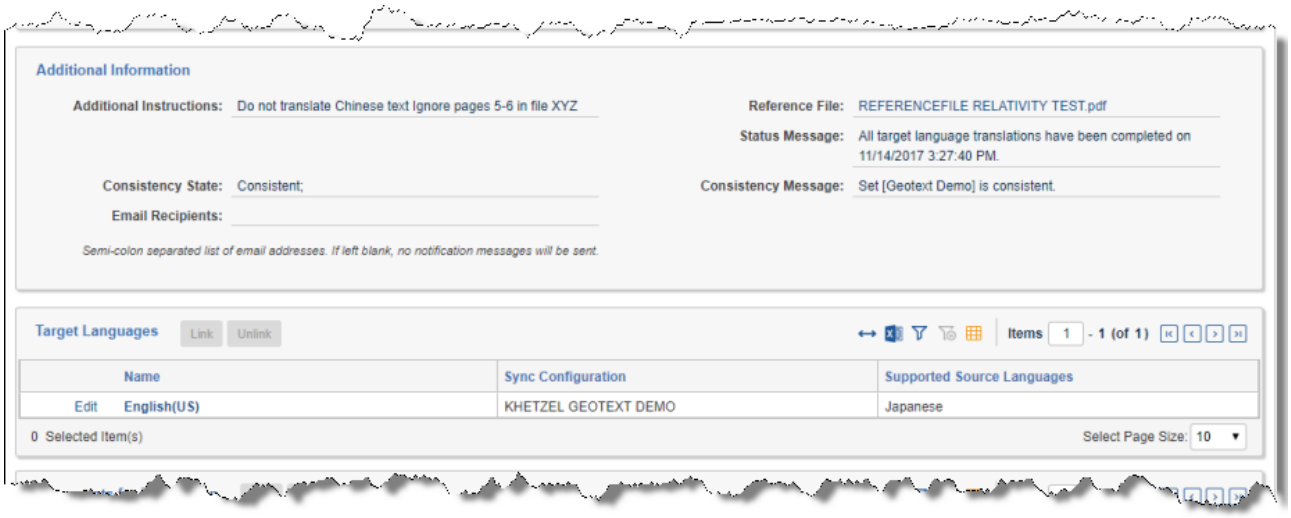
The following information is displayed in the **General Information** section:

Field	Description
Submission Name	Your name for this submission set.
C/M Number, Project Name	The purchase order (PO) number for this submission set.
Document Source	This field is blank. The documents in this submission set are listed in the **Documents for Translation** set, described below.
Source Language	The original language of the documents sent for translation.
Requires Quote Approval	Displayed and relevant only for submission sets submitted to Lionbridge Freeway. Indicates whether a quote is required before the translation process starts.
Send Configuration	The translation-provider configuration used when this submission set was sent out for translation.
Requested Return Date	The deadline for completing this translation. **Note:** The date/time format and timezone are determined by the server where Relativity is installed.
Set Scheduled Date	If this submission set was scheduled, this is the date and time that it was sent for translation.

5 Monitoring Translation Status and Viewing Translation History

Field	Description
Document Metadata Fields	Displayed and relevant only for submission sets submitted to an FTP or SFTP server. This lists which fields in the documents in this submission set are metadata.

4. You can scroll down to view the **Additional Information** and **Target Languages** sections.



The following information is displayed in the **Additional Information** section:

Field	Description
Additional Instructions	Any requests, additional information, or guidance for the translator that was added to this submission set.
Consistency State	This read-only field is populated after the submission set is created. It displays either: ■ `Consistent`, which indicates that the parameters specified for this submission set are consistent and you can send the submission set for translation. ■ A message about any inconsistencies in the parameters specified for this submission set. For example, it can display a message if an unsupported analysis code is selected. **Important:** You must resolve the inconsistencies before you can submit the submission set for translation.

5 Monitoring Translation Status and Viewing Translation History

Field	Description
Email Recipients	The email addresses of the recipients of notifications about this submission set. The recipients receive an email notification when the submission set is available in Lionbridge Freeway or on the FTP or SFTP site. For more information, see "Receiving Email Notifications" on page 83.
Reference File	The link to a support asset, sent to your translation provider as part of the submission set. This provides helpful context for the translator. Clicking the link either opens the reference file in a new browser tab or prompts you to download the file.
Status Message	After submitting the submission set for translation, this read-only field displays a status message about the translation status. For a list and description of translation statuses, see "Translation Statuses" on page 82.
Consistency Message	This read-only field is populated after the submission set is created. It displays either: ■ If the read-only **Consistency State** field, described above, displays `Consistent`, then this field displays `Set [`*submission set name*`] is consistent.` ■ If the read-only **Consistency State** field, described above, displays an inconsistency message, then this field displays a details about the inconsistencies. For example, if an unsupported analysis code is selected in the **Translation Type** option, this field provides additional detail, such as the name of the analysis code and that it is not supported for the specified **Send Configuration**, described above.
Project ID	After submitting this submission set to Lionbridge Freeway, this read-only field displays the identifier that Freeway assigns to the corresponding translation project. This read-only field is displayed only if the translation-provider configuration selected in **Send Configuration**, above, is for Lionbridge Freeway. It is populated after the submission set is submitted.

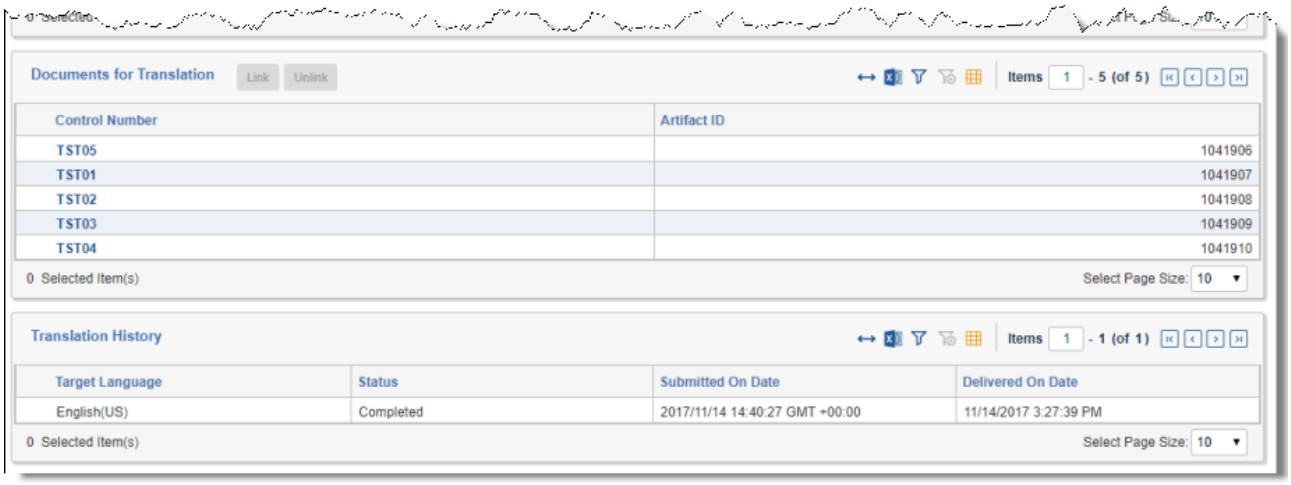
The following information is displayed in the **Target Languages** section:

Field	Description
Name	The name of the target languages to which the documents in this submission set were sent for translation.
Sync Configuration	The translation-provider configuration (**Send Configuration**) used to send this submission set for translation.

5 Monitoring Translation Status and Viewing Translation History

Field	Description
Supported Source Languages	The original language of the documents in this submission set.

5. You can scroll down to view the **Documents for Translation** and **Translation History** sections.



The following information is displayed in the **Documents for Translation** section about each document in the submission set:

Field	Description
Control Number	The document's control number in Relativity.
Artifact ID	The document's artifact ID in Relativity.

The following information is displayed in the **Translation History** section about all translations of the documents in this submission set:

Field	Description
Target Language	The target language into which the documents in this submission set were translated.
Status	The translation status of the documents in this submission setfor translation into this target language. For a list and description of translation statuses, see "Translation Statuses" on page 82,

Field	Description
Submitted on Date	The date and time when the submission set was sent for translation. **Note:** The date/time format and timezone are determined by the server where Relativity is installed.
Delivered on Date	The date and time when the translated documents were returned to Relativity. **Note:** The date/time format and timezone are determined by the server where Relativity is installed.

Note: You can also view translation history and related documents from the **Documents** tab. For detailed instructions, see "Viewing which Submission Sets Reference a Document" on page 88.

5.1 Translation Statuses

There are different translation statuses, depending on whether the submission set is submitted to Lionbridge Freeway or to an FTP or SFTP server.

Note: Before submission, the **Status** field of the submission set is blank.

Lionbridge Freeway

Submission sets submitted to Lionbridge Freeway have one of the following translation statuses:

Translation Status	Description
Quote	The submission set has been submitted to Lionbridge Freeway for a quote.
Submitted	The submission set has been submitted. If it required a quote, then it has already been approved.
Cancelled	The corresponding translation project was cancelled in the App before it reached **In Translation** status, described below.
Pending Quote	Lionbridge Freeway has delivered a quote for the submission set. This quote requires approval before the translation starts.
Approval	The quote for the submission set was approved.
In Translation	Lionbridge Freeway has received the submission set and has not yet returned the translated documents.

Translation Status	Description
Delivered	Lionbridge Freeway has delivered the translated documents to the App.
Completed – Pending Approval	The App has returned the translated documents to Relativity and they are waiting for review and approval.
Closed – Approval Received	The translated documents have been approved.

FTP/SFTP

Submission sets submitted to an FTP or SFTP server have one of the following translation statuses:

Event	Description
Submitted	The submission set has been submitted to the server.
In Translation	The documents in the submission set were successfully delivered to the specified FTP or SFTP server.
Completed	The App has retrieved the translated documents from the specified FTP or SFTP server and returned them to Relativity.

5.2 Receiving Email Notifications

If your email address was added to a submission set before it was submitted for translation, then the App sends you emails notifications when there are changes to the translation status of the submission set.

Note: SMTP settings must be configured for the email address that sends out notifications from the App. For detailed instructions, refer to the *Lionbridge for Relativity Installation and Configuration Guide*.

Lionbridge Freeway

For submission sets sent to Lionbridge Freeway, the App sends email notifications when the following translation-status events occur:

Event	Description
Cancelled	The corresponding translation project was cancelled in Relativity.

Event	Description
Project in Production	Lionbridge Freeway has received the translation project and has not yet returned the translated documents.
Completed – Pending Approval	Lionbridge Freeway has returned the translated documents and they are ready for review.
Approval Received	The translated documents from Lionbridge Freeway have been reviewed.

FTP/SFTP

For submission sets sent to an FTP or SFTP server, the App sends email notifications when the following translation-status events occur:

Event	Description
In Translation	The documents in the submission set were successfully delivered to the specified FTP or SFTP server.
In Translation with errors	Errors occurred when the App delivered the documents in the submission set to the specified FTP or SFTP server. For more information on receiving documents from the App on an FTP or SFTP server, refer to the *Lionbridge for Relativity Translator Guide for FTP/SFTP Users*.
Completed	The App has retrieved the translated documents from the specified FTP or SFTP server and returned them to Relativity.

6 Post-Translation Tasks

6 Post-Translation Tasks

You can perform the following post-translation tasks:

- "Reviewing Translated Documents" on page 85.
- If you submitted content for translation to Lionbridge Freeway, you can approve the translated documents to change the status of the submission set from `Completed - Pending Approval` to `Closed - Approval Received`: "Approving Translations from Lionbridge Freeway" on page 87.

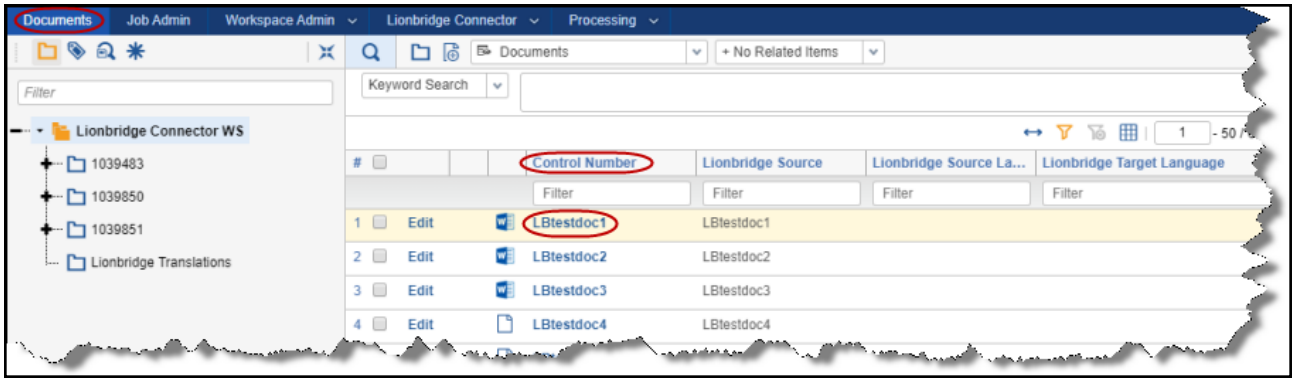
  Note: There is no approval process within the App for documents received from an FTP or SFTP server. Best practice is to review and approve these documents independently, without using the App. When the translated documents are finalized, the translators upload them to the FTP or SFTP server. The App then automatically imports these documents into Relativity. For detailed instructions, refer to the *Lionbridge for Relativity Translator Guide for FTP/SFTP Users*.
- "Viewing which Submission Sets Reference a Document" on page 88.
- "Viewing Related Documents" on page 90.

6.1 Reviewing Translated Documents

You can review translated documents after the App returns them to Relativity.

To review a translated document:

1. Click a workspace where the App is installed.
2. Click the **Documents** tab to display a list of available documents.

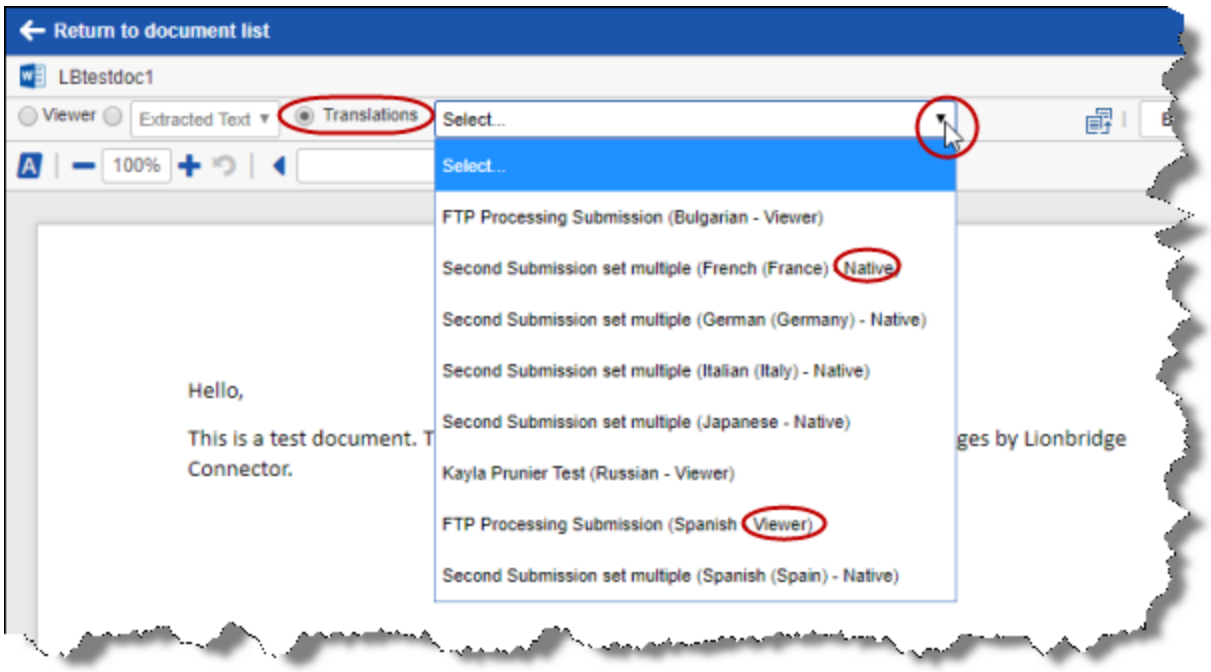


3. In the **Control Number** column, click a document's control number to open it in the viewer.

Note: The **Control Number** column displays both source documents (submitted for translation) and target documents (translated documents).

Tip: Use the **Lionbridge Source** column to identify the name of a source document, so that you can identify a translated document. For a translated document, the name in the **Control Number** column can be different from the name in the **Lionbridge Source** column.

4. Above the document, click the **Translations** radio button, and then select the translated language version to view from the dropdown menu.



- If the document was submitted for translation *with processing settings*, then – `Viewer` is added to the document name in the dropdown list.
- If the document was submitted for translation *without processing settings*, then – `Native` is added to the document name in the dropdown list.

The translated document is displayed.

What Can You View?	Submitted with Processing Settings	Submitted without Processing Settings
Document types.	View all translated documents of supported document types. For a detailed list of supported file types, refer to the appropriate version of the Relativity documentation, at: https://help.relativity.com/9.7/Content/Relativity/Processing/Supported_file_types_for_processing.htm#Supported_file_types.	View only . `PDF` and . `TXT` files.
Source and/or target documents.	View both source and target documents.	View only source documents.

6.2 Approving Translations from Lionbridge Freeway

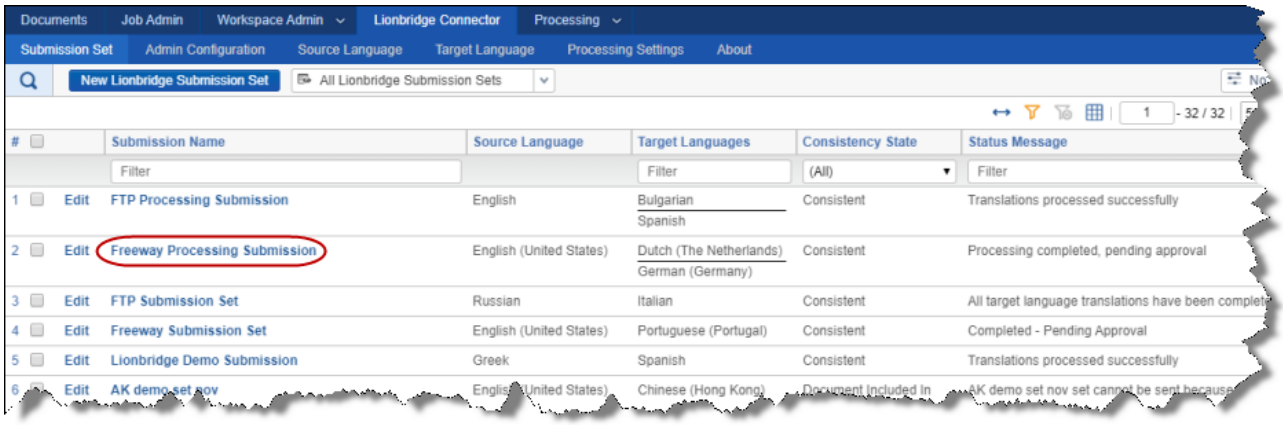
The App automatically retrieves translations from Lionbridge Freeway. This enables you to review and approve the translated documents.

After you review the translated documents from Lionbridge Freeway, as described in "Reviewing Translated Documents" on page 85, you can use the **Approve Translations** button to change the status of the submission set from `Completed - Pending Approval` to `Closed - Approval Received`. For descriptions of these statuses, see "Translation Statuses" on page 82.

To approve translations from Lionbridge Freeway:

1. Click a workspace where the App is installed.

2. Click the **Lionbridge Connector** tab and then click the **Submission Set** child tab.

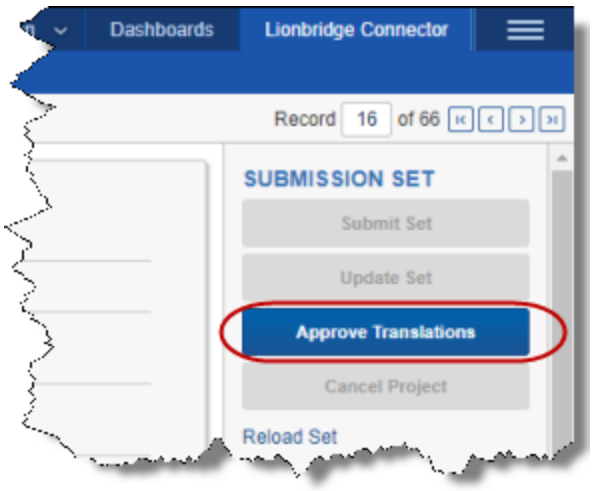


3. Click the link for a submission set in the **Submission Name** column.

   The **Lionbridge Submission Set Layout** opens. For detailed information about this page, see "Monitoring Translation Status and Viewing Translation History" on page 77.

   Note: The **Status Message** field displays `Completed - Pending Approval.`

4. In the top-right corner. click **Approve Translations**.



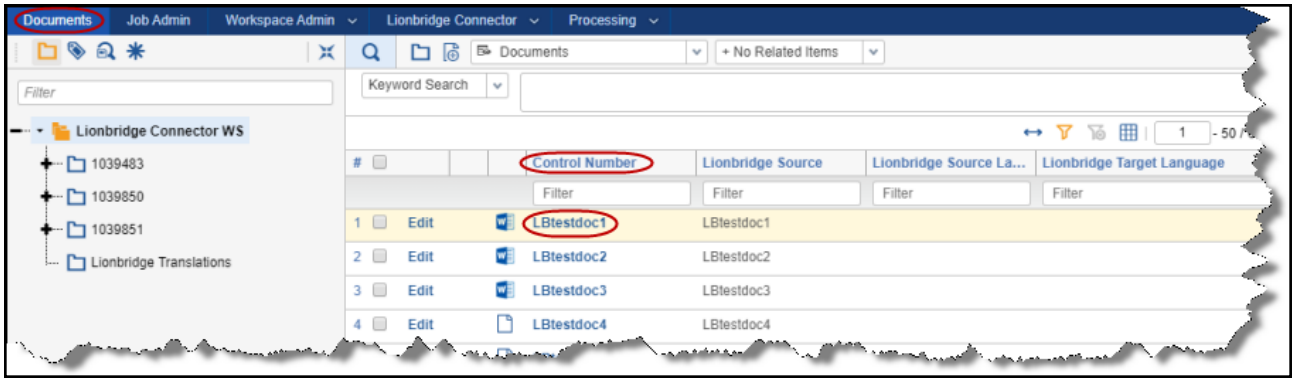
   The **Status Message** field updates to display `Closed-Approval Received.`

6.3 Viewing which Submission Sets Reference a Document

You can view which submission sets reference a specific document. This shows all instances of a document being submitted for translation.

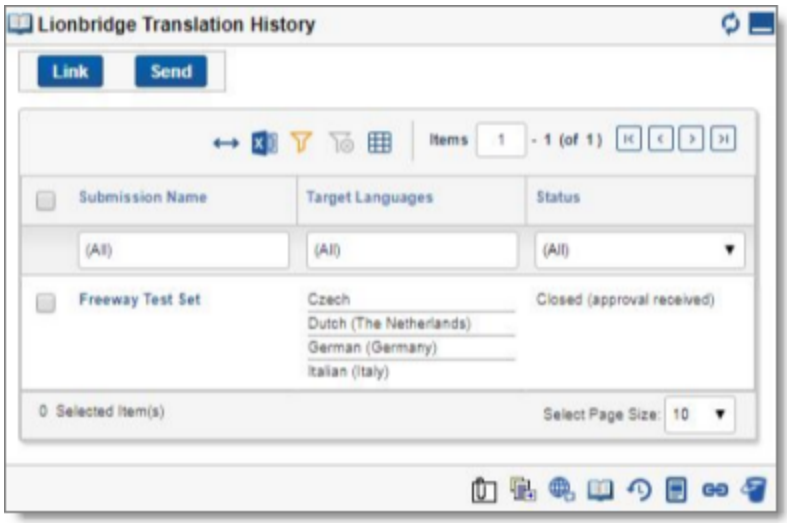
To view which submission sets reference a specific document:

1. Click a workspace where the App is installed.
2. Click the **Documents** tab to display a list of available documents.



3. In the **Control Number** column, click a document's control number to open it in the viewer.
4. At the bottom of the **Document Metadata** pane, which is on the right side of the document viewer, click the **Lionbridge Translation History** icon .

   The **Lionbridge Translation History** pane opens.



   This displays all the submission sets that reference this document, which indicate its translation history with Lionbridge:

Column Header	Description
Submission Name	Lists all submission sets that reference this document.
Target Languages	Lists all the languages into which this document was translated, in the corresponding submission set.
Status	Displays the translation status of the translated documents. For a list and description of translation statuses, see "Translation Statuses" on page 82.

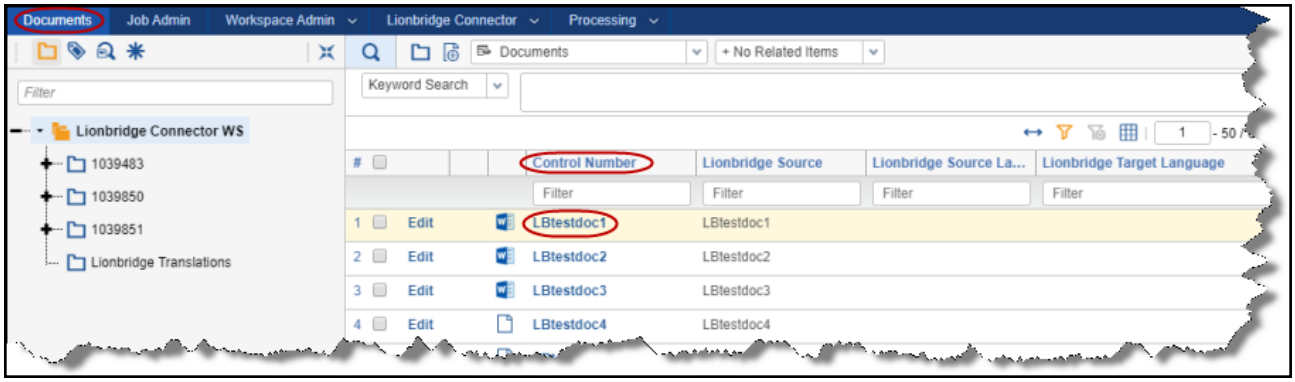
6.4 Viewing Related Documents

You can view which source and target documents are related.

- *Source* documents are submitted for translation.
- *Target* documents are translated documents, received from the translators.

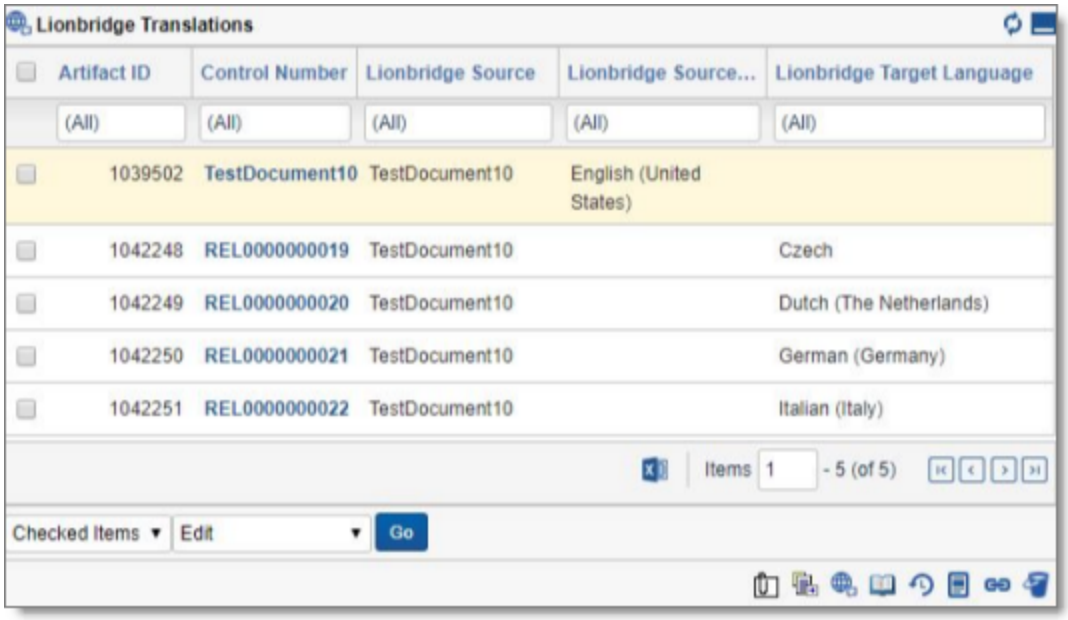
To view which source and target documents are related:

1. Click a workspace where the App is installed.
2. Click the **Documents** tab to display a list of available documents.



3. In the **Control Number** column, click a document's control number to open it in the viewer.
4. At the bottom of the **Document Metadata** pane, which is on the right side of the document viewer, click the **Lionbridge Translations** icon .

The **Lionbridge Translations** pane opens.



This displays all related source and target documents:

Column Header	Description
Artifact ID	Relativity's unique identifier for the document.
Control Number	The App's unique identifier for the document. Click the link to view the document.
Lionbridge Source	The source document that was submitted for translation.
Lionbridge Source Language	■ For *source* documents, this is the language of the document. ■ For *target* (translated) documents, this column is blank.
Lionbridge Target Language	■ For *target* (translated) documents, this is the language of the document. ■ For *source* documents, this column is blank.